

JISC Portfolio for Senior Managers

Employing technology to support your business goals

Produced for the Leadership Foundation's Higher Education Summit 2010: Leading the Agile University: Innovation Creativity Technology



About JISC

JISC inspires UK colleges and universities in the innovative use of digital technologies.

JISC invests heavily in research and development, offering over 18 million users access to quality assured resources through our secure network. We provide expert advice, help to save money through national content licence agreements and work with colleges and universities to realise the potential of their existing technologies.

Everything we do has one aim – to maintain the UK's position as a global leader in education and research.

JISC provides:

- A world-class network – JANET
- Access to electronic resources
- New approaches to learning, teaching and research
- Guidance on institutional change
- Advisory and consultancy services
- Regional support for further education colleges

JISC is sponsoring the Leadership Foundation's Higher Education Summit 2010. Taking the subject Leading the Agile University: Innovation Creativity Technology, the summit aims to bring together leaders and managers from across higher education institutions to consider approaches to fostering and harnessing innovation, creativity and technology in the UK and internationally.

JISC is demonstrating the wealth of expertise and resources it offers to higher and further education senior managers with briefings under five key themes:

- Strategies for agile institutions: scenario planning
- Relationship management and business intelligence
- Research rigour, accessibility and impact
- Alternative business models for higher education
- Enhancing the student and staff experience

Leading the Agile University: Innovation Creativity Technology:

www.lfhe.ac.uk/evt-crs-prog/heleadershipsummit2010

Foreword



It is very rewarding to have selected a subject for our 2010 Leadership Summit (Leading the Agile University: Innovation

Creativity Technology) that becomes more and more relevant by the day – if only judged by the huge demand for places! It is equally rewarding that this theme, now underpinning a key part of Leadership Foundation work, emerged from a well thought-through dialogue with JISC, as a long-term strategic partner.

'...this Leadership Summit is another key milestone in the JISC/Leadership Foundation partnership.'

Let's unpack the concept of the Agile University. Firstly, it is about the capacity to innovate, particularly in new business or operating models. Secondly, it requires a creativity in how the institution is structured and people are equipped to lead and manage it. Thirdly, it requires a strategic and entrepreneurial approach to the use of technology. These cannot work in isolation – all three have to play positively and creatively on each other, and form key components of a new organisational structure.



The emphasis on technology is vital. It goes back to Lord Dearing's report of 1997. He always thought that the one part of his report which had not been implemented was 'recommendation 42' – on the need for senior leaders to take a strategic view of technology. This requires a new mindset, which takes technology out of the sole domain of IT/IS managers and places it in a shared space with other institutional leaders. We were really pleased that 15 months ago we held our first Strategic Leadership Conference on Technology in Higher Education, which pulled together a really broad cross section of generalist and specialist leaders.

So this Leadership Summit is another key milestone in the JISC/Leadership Foundation partnership. Working together with other partners, such as the Open University, we can demonstrate that this cultural shift in higher education institutions is not just 'nice to do', but for many a key to survival in a really challenging and competitive world.

January 2010
Ewart Wooldridge CBE
Chief Executive
Leadership Foundation for Higher Education

Strategies for agile institutions: scenario planning



Steve Bailey
Senior advisor at JISC Infonet

 **Duration**
1:46 mins

Scenario planning is a strategic tool used to make flexible long-term plans. It is a method for learning about the future by understanding the nature and impact of the most uncertain and important driving forces affecting our world. While not a crystal ball, it is a creative yet structured approach, which has been successfully used in a variety of settings and circumstances from idea generation to 'wind tunnelling' proposals and risk analysis.

Scenario planning is about preparing for potential futures: you identify where you think the world may be heading and plan your response accordingly. This is critical for university managers who are constantly having to make

important investment decisions, with a finite amount of resources, that affect strategic direction. It is vital to know that those resources are being put in the right place, and scenario planning can help with this kind of decision-making by exploring how likely it is that the scenario under consideration will appear and how well-placed the institution is to handle it when it does.



Through scenario planning you may realise that a major investment decision would only really work if one particular worldview, one particular scenario, comes to fruition and by taking it there is a danger of putting all the institutional eggs in one basket. However, it might be that taking a slightly different approach minimises the risk because it is more likely to be applicable in more potential scenarios.

'Scenarios provide alternative views of the future. They identify some significant events, main actors and their motivations, and they convey how the world functions. Building and using scenarios can help us explore what the future might look like and the likely changes of living in it.'

Being agile means having the ability to move in so many different directions, but you need to know if you are moving in a way that will allow you to progress, that is likely to give a good return on investment. Scenario planning means looking at whether you are making the right decisions for the future rather than just the right decisions for now.

How JISC can help

Scenario planning step-by-step guide



Get started on scenario planning with the JISC infoNet 'how to' guide that covers scoping, trend analysis, building scenarios, generating and testing options and action plans. It highlights different approaches to creating scenarios and suggestions for applying creativity to the process, from brainstorming to storytelling, visualisation and enactment techniques.

www.jiscinfonet.ac.uk/tools/scenario-planning/steps

Strategy infoKit



The Strategy infoKit isn't designed to tell you how to develop and implement your strategic activity. We don't claim to have all the answers and yet, at the same time, we are firm believers in the notion that nothing is ever perfect and that even small improvements to the status quo can often yield big returns. If all this resource does is to encourage you to stop and question how

you currently conduct strategic activity within your institution it will have performed an important function. Its framework is deliberately non-prescriptive and non-dogmatic. It does not require you to reject the way you currently do things and to 'sign-up' to our approach. Instead, it simply reflects what we believe to be the most important tasks and processes required to successfully articulate, coordinate and manage strategic activity within your institution. Every page of the Strategy infoKit has been peer reviewed by 15 experienced managers and business planning practitioners.

www.jiscinfonet.ac.uk/strategy

Impact Calculator



The Impact Calculator is a downloadable tool that can be used to demonstrate the impact of any change initiative by quantifying the tangible benefits or efficiency gains that can be derived from it. In doing so it allows you to: identify and measure as many benefits as you wish resulting from a process

redesign; record the costs involved; determine if and when a return on investment is achieved and measure the improvement realised against baseline performance quantify benefits in both monetary and non-monetary terms.

www.jiscinfonet.ac.uk/impact-calculator

Relationship management and business intelligence

In a challenging climate, institutional business sustainability depends on strategic oversight, agility, responsiveness and cohesiveness – in short: knowing your processes, adapting to your 'market', playing to your strengths.

Higher education institutions work with an increasingly diverse range of clients – from staff and on-site students to remote learners, alumni, and local authorities and businesses – and need to understand and manage an ever-wider range of interactions.

In their business and community engagement (BCE) activities, the breadth of interactions with external parties extends from private and public sector organisations to cultural bodies to community groups and members of the public. With multiple contacts, limited resources, information overheads and the need to ensure operational efficiency and consistency, it makes sense to record and manage these interactions in a coherent way.

Each institution has strategic partners that they value above others in the context of their engagement strategy, so there is also a need to ensure the partnership strategies are implemented across the organisation and that duplication and conflicting approaches do not occur, so that the partnerships deliver business value rather than become a drain or a liability.

Collaborative activities are critical for business sustainability but the multiplicity and multi-faceted nature of institutions' external interactions, partnerships and relationships can be a significant operational challenge.


Effective customer relationship management (CRM) is one process that can help to ensure that both sides of an institution's interactions are managed well: relationships with external clients and partners are productive and sustainable, and internal information – business intelligence – is properly managed.

The benefits are clear. Partnerships can become more productive and strategic; institutions more business-

like with better-integrated information, knowledge, resource and record management, and central marketing; and there is more accurate reporting of enterprise interactions both for internal benchmarking and quality and for external reporting.

An agile university is one that can adapt quickly to change in today's evolving and demanding marketplace. To achieve this, it is vital that it has established processes and put in place systems to allow information to be joined-up and analysed. With this kind of business intelligence flowing freely, institutions are able to make better strategic decisions.

Simon Whitemore
Programme manager, Business and Community Engagement

 **Duration**
1:51 mins

How JISC can help

JISC's Business and Community Engagement programme supports UK institutions in their strategic management of relationships with partners and clients external to the institution and of the associated services. A strategic priority for the programme is to equip institutions with the tools and good practice they need to make effective and sustainable investment decisions. This is particularly true of using CRM to manage knowledge effectively. The programme also facilitates fruitful collaboration, knowledge enrichment and co-development across the institutional-external partner boundary through web technologies and online engagement.

As part of its relationship management work, the programme has researched CRM usage across the sector and found it to be patchy and underdeveloped – most institutions are using CRM processes peripherally, some tactically and very few strategically. JISC equips senior managers, through a CRM Maturity Model and a Self-Analysis Framework, with the means to assess and enhance the readiness of their institution to derive value from CRM. The aim is to avoid premature purchases of CRM systems when the business processes and protocols are not in place to enable the investment to be realised.

CRM Self-Analysis Framework

The CRM Self-Analysis Framework encompasses guides, insights, research and tools designed to help higher education institutions work through their approach to CRM. It enables institutions to position themselves within JISC's CRM Maturity Model, according to three defined levels – peripheral, tactical or strategic – and to



plan their progression. The Framework is a synthesis of good practice, and includes process maps around CRM usage from a range of different institutions, sections on needs analysis, customer value, change readiness and process mapping, as well as guidance on how an institution at one level of maturity might move to the next level.

<http://jisc.cetis.ac.uk/crm-tools>

CETIS Relationship Management

JISC CETIS provides support and good practice guides to help institutions in their approach to relationship management. This builds on the CRM Self-analysis Framework.

<http://jisc.cetis.ac.uk/support/relationship-management>

Record Management Maturity Model



The Maturity Model aims to give an accurate, reliable and honest summary of the current level of maturity of the records management measures within your institution. It can help with: identifying and providing evidence of good practice in records management; providing evidence of compliance with the Freedom of Information Act and its Code of Practice; identifying gaps and areas of weaknesses, which may require improvement; measuring the extent to which your institution views records management as an operational and strategic priority.

www.jiscinfonet.ac.uk/records-management/measuring-impact/maturity-model

Research rigour, accessibility and impact

Universities increasingly have to justify their research role in terms of academic rigour, impact and efficiency. Drivers include the Research Excellence Framework and the strategic direction of the Research Councils. Furthermore, with cuts in higher education public spending likely over the next few years, universities will also be looking for additional funding from the private and third sectors, as well as needing to ensure their operations are as efficient as possible.

Open Access offers one straightforward way for universities to increase the visibility and impact of their research, within and beyond the academic community, within existing budgets. Recent research suggests that universities could gain efficiency savings, as well as giving their research much more impact, by making the research papers openly available. Furthermore, arguments are increasingly being made that both research and the wider economy benefits when research data and even workflows are shared.

The infrastructure, such as repositories, used for disseminating research outputs can also help universities manage their research information more effectively, to improve business intelligence and



Neil Jacobs

Programme manager within the Information Environment team



Duration
1:45 mins

external reporting. The University of Glasgow offers an excellent example of this kind of institutional infrastructure. When researchers at Glasgow put their papers into Enlighten, the institutional repository, they also record them for the Research Excellence Framework and internal management. It is a straightforward process because the repository is integrated into the systems researchers use every day. Furthermore, this integration means that researchers are reminded at the right times of any relevant funder grant conditions.

While there are important managerial factors driving change, there are also significant developments in the ways in which research is being done. JISC

has funded a range of work on 'virtual research environments', whereby researchers can share resources and collaborate effectively throughout the research lifecycle. The research process is closely linked to the research lifecycle (including publishing and grant acquisition) and interoperability of systems between these two levels is imperative for success and long term sustainability. Furthermore, emerging research practices based on social networking, and new kinds of research, such as data-driven 'predictive science', 'open notebook science' and 'citizen science', can all carry significant implications for institutions and funders, in terms of the infrastructure, policies and skills needed.

How JISC can help

The Houghton Report



According to the Houghton report (January 2009), core scholarly publishing system activities cost the UK higher education sector around £5 billion in 2007. The sector could save £80m per year by shifting to Open Access publishing, as well as making a considerable contribution to the UK economy and society in general by allowing easier access to research outputs. JISC has

funded work to take the evidence from the Houghton report and present it at an institutional level. The result is a methodology and a way of collecting data that will enable any institution thinking of moving towards an Open Access model to build the case for that move and assess the costs and benefits to them of doing so. It has been trialled in a wide range of institutions and all of them estimate significant benefits by going down the Open Access route.

www.jisc.ac.uk/publications/reports/2009/economicpublishingmodelsfinalreport

Data Audit Framework



There are both potential risks and opportunities from holding and sharing data and institutions need to manage these at the highest level. If institutions are to realise the full potential value of their data through

its reuse, they must establish an overview of holdings and the practices in place to manage them. The audit generates two key outputs to this end – an inventory of data assets and a report

recommending how data management could be improved. The Framework's four-step audit methodology and online tool are designed to bring order, continued access and therefore added value to the existing and future data assets of institutions. The four stages of the Data Audit Framework are: planning the audit; identifying and classifying assets; assessing management of data assets; reporting and recommendations.

www.data-audit.eu

Digital Curation Centre



Research has shown that there are significant skills gaps around the new socially networked research lifecycle and in data management skills. JISC has invested in support and training via the Digital Curation Centre to address these gaps. The Centre supports UK institutions who store, manage

and preserve digital data to help ensure their enhancement and their continuing long-term use.

www.jisc.ac.uk/publications/reports/2009/earlycareerresearchersstudy

www.dcc.ac.uk

Alternative business models for higher education

As budgets tighten, will scholarly digital content be able to survive and thrive? JISC has made significant investments in licensing and creating online resources for higher education, providing access to digitised previously difficult to access material such as journals, newspapers, books, theses, photographs and sound recordings.

As well as providing new avenues for research and teaching, such online resources provide an opportunity to forge links with communities outside tertiary education, thus increasing impact and exploiting the potential for knowledge exchange. They can also help to spread the cost of digitisation across the community (education and public sectors) so that it is not borne entirely by the host institution.

Two examples of this type of digital community building in action are the First World War Poetry Archive and East London Lives 2012. The former has not only published online the manuscripts



Alastair Dunning
Digitisation programme manager

 **Duration**
1:44 mins

Stuart Dempster
Director of the Strategic Content Alliance

 **Duration**
0:32 mins

of noted war poets such as Siegfried Sassoon and Wilfred Owen, but has fostered and encouraged the involvement of the general public with contributors digitising, documenting and describing their own diaries, medals, posters and other First World War items. The latter is a digital archive project that documents aspects of change in the lives of East Londoners towards the hosting of the 2012 Olympic and Paralympic

games. The archive not only contains interviews, videos and images of residents' thoughts and opinions in the build-up to the Games, but also acts as a place for researchers working in this field, both now and in the future.

The JISC-commissioned report by Chris Batt, 'Digitisation, Curation and Two-Way Engagement', addresses how universities can use such resources to respond quickly to and successfully interact with new communities, and in some cases, help foster those communities.

JISC's leadership role in the Strategic Content Alliance has provided new findings and new strategies for the host of issues that arise in creating, managing and delivering online resources. Working with the BBC, the British Library, BECTA, the NHS and MLA (Museums, Libraries and Archives Council), the Alliance has developed models and strategies for vital issues such as business models for sustainability, intellectual property rights and audience analysis.

How JISC can help

Running a Community Collection project (RunCoCo)

The team behind the Oxford Great War Archive are running a series of dissemination activities to show other institutions how similar initiatives could be run. The project will also provide a range of software tools, documentation and workflows to support embedding this activity into other institutions.

www.jisc.ac.uk/whatwedo/programmes/digitisation/econtent/runcoco

Sustaining Digital Resources: An On-the-Ground View of Projects Today

This study outlines the stages that successful projects undertake in developing sustainability models: from empowering leadership and developing accountability structures, to crafting a strong value proposition that responds to user needs, to securing the resources needed to help the project thrive. By highlighting the benefits and challenges of a wide range of models, this work is intended to serve as a starting point to understanding the options and obstacles facing digital scholarly content projects today.

<http://sca.jiscinvolve.org/business-modelling-publications>

Briefing Papers

These have been developed to highlight key factors for sustainability against a set of personas. Specifically developed for university librarians, scholarly digital content project leaders and archivists and curators, they highlight suggestions that might be especially useful from the Sustaining Digital Resources: An On-the-Ground View of Projects Today guide and case studies.

<http://sca.jiscinvolve.org/business-modelling-publications>

Sustainability and Revenue Models for Online Academic Resources

This study looks at the factors influencing the sustainability of not-for-profit digital resources. It has created a framework for thinking about sustainability and suggested a number of financial models that digital projects could pursue. The study has stimulated a lively dialogue within the community about ways to strengthen the long-term prospects for non-profit digital resources.

<http://sca.jiscinvolve.org/business-modelling-publications>

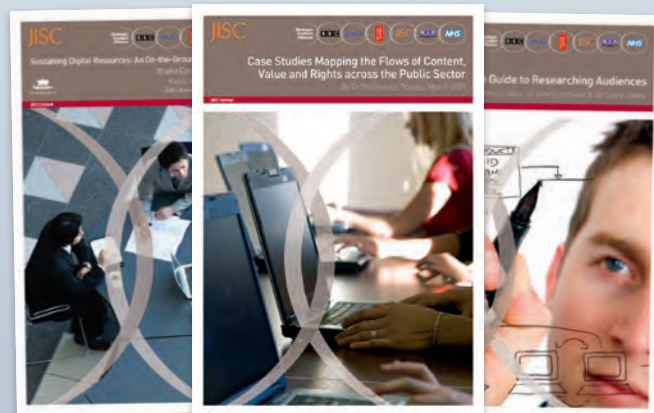
Strategic Content Alliance Toolkits

By sharing best practice within many public sector organisations, the Alliance has created a number of strategic toolkits designed to tackle the problems in creating and managing digital resources. These include: Business Models for Sustainability; Intellectual Property Rights; and Audience Analysis.

<http://sca.jiscinvolve.org/business-modelling-publications>

<http://sca.jiscinvolve.org/ipr-publications>

<http://sca.jiscinvolve.org/audience-publications>



Enhancing the student and staff experience

As institutions deal with increased student numbers and seek to offer the best possible provision they can to their customers, it is more important than ever that they are well equipped to understand the learners that are coming through their doors. Students are no longer a relatively homogeneous group. Increasingly they might be part-time learners, combining studying with work and childcare, they might be studying remotely, be work-based learners or they might be from overseas – and institutions need to be as flexible as they possibly can in how they meet the diverse requirements of today's students.

There is also a new emphasis on student perspectives, evident in initiatives such as the National Student Survey, the Committee of Inquiry into the Changing Student Experience, student juries and the Department for Innovation, Universities and Skills Debate on the Future for Higher Education.



JISC has been researching student expectations since 2005. For today's learners, technology is a key support mechanism as they juggle their studies and other commitments. It is ubiquitous throughout their lives and they expect the same when they come into an institution. They also expect guidance and support from institutions on how best to use technology for their learning.

Meanwhile, staff working in institutions have to adapt to these changing student demographics and their expectations. University staff are charged with more demands from business and from professional bodies to ensure that the qualifications, skills and knowledge that their students attain is gearing them for

their work and lifelong learning lives. Staff are faced with the challenge of how to make the most out of the finite resources that they have in order to ensure that the student experience is the best that those students can have in their institution.

Students and staff working together can really exploit the benefits of technology and ensure that it is planned in and designed into the curriculum. JISC enables the development and effective use of digital technologies to support learning and teaching in universities and colleges, so that staff benefit from the opportunities technology offers, and students enjoy a more flexible learning experience.

How JISC can help

JISC is leading the way in investigating students' changing expectations and developing tools and resources to transform the learning experience to meet students' needs. Our work enables universities and colleges to apply digital technologies to challenges such as retention, progression, graduate employability, diversity and widening participation, thereby giving students the best possible opportunities wherever and however they study.

Through a range of activities, including workshops, accredited training, and guidance materials, JISC and its services advise on the use of new technologies and their relevance to a range of core business processes. Topics covered include legal issues, support for accessibility, using digital media, improving administration and providing inclusive learning experiences.

The Design Studio



Curriculum design touches every aspect of an institution's core business – from aligning its portfolio of courses to its mission and vision, through market research and product development to quality assurance, recruitment, assessment, resource allocation

and timetabling. The Design Studio is a dynamic web-based toolkit which draws together a range of resources around curriculum design and delivery and the role technology plays in supporting these processes and practices.

www.jiscinfonet.ac.uk/curriculum

Managing Curriculum Change



Managing Curriculum Change introduces two major JISC programmes of research that investigate how the use of technology can help make curriculum design processes more agile and responsive and the experience of learning more engaging, inclusive and rewarding.

www.jisc.ac.uk/publications/documents/managingcurriculumchange

Responding to Learners

This resource pack synthesises the outcomes from the Learner Experiences of e-Learning theme of the JISC e-Learning Programme, which funded a total of ten projects from 2005 to 2009. It had the sustained involvement of over 200 learners and more than 3,000 survey respondents to explore learners' perceptions of and participation in technology-enhanced learning in a digital age.

www.jisc.ac.uk/publications/documents/respondingtolearners

Effective Practice in a Digital Age



A visually rich publication that includes ten case studies, Effective Practice in a Digital Age outlines key aspects of designing learning in a technology-rich context and is structured to address the needs of experienced practitioners as well as those new to technology-based learning and teaching.

www.jisc.ac.uk/practice

Take three steps...

JISC experts suggest three steps, within five key areas of challenge for universities, that institutions can take to tackle some of the issues facing universities today.

Enhancing the student and staff experience

Sarah Knight, programme manager within the e-learning team within the JISC Innovation Group

- 1 Ensure that best practice and innovation is being shared across your institution rather than being confined to pockets of excellence
- 2 Check that the student voice is represented across committees and planning groups so that your students' views and expectations are heard
- 3 Make the most of the advice and guidance that JISC offers in this area: there is a wealth of resources in relation to technology supporting learning and teaching

'Combine technology-enhanced options with the best of established practice to create meaningful and transformative learning experiences'

Strategies for agile institutions: scenario planning

Steve Bailey, senior advisor at JISC Infonet

- 1 **Read** – explore the range of resources on the JISC infoNet website aimed at this area
- 2 **Review** – look at where you are right now with a very open mind. It is easy to assume that things that have been in place for a long time are fit for purpose, but take a critical eye at things such as mission statements – can it be changed?
- 3 **Measure** – be clear about the metrics you are going to use and whether you are happy with them as indicators of progress. How will you know you have made those improvements and achieved that benefit?



Relationship management and business intelligence

Simon Whittemore, programme manager, Business and Community Engagement

- 1 **Know your processes** – across academic departments and business functions. Institutional efficiency and credibility may be at stake. Use the CRM Self-analysis Framework to self-appraise
- 2 **Know your markets** – segment your external 'market' (not just commercial); involve central marketing and ensure capability and capacity to effectively manage strategic partnerships
- 3 **Play to your strengths** – universities cannot do everything in terms of external engagement; develop the business intelligence to inform well-founded and sustainable strategic choices

Research rigour, accessibility and impact

Neil Jacobs, programme manager within the Information Environment team

- 1 Put in place practices, policies and infrastructure to ensure that your institution's research outputs are made Open Access

- 2 Review your infrastructure for the collection and management of research administrative information and join with JISC to ensure that good practice is spread across the sector
- 3 Review your risk management strategy and see what contribution the JISC Data Audit Framework can make to it

Alternative business models for higher education

Stuart Dempster, director of the Strategic Content Alliance, and Alastair Dunning, Digitisation programme manager

- 1 Look at the body of evidence being developed about new business models and send your specialist staff to attend workshops and review the documentation before any tough decisions about resources are made
- 2 Read Chris Batt's report that looks at the first steps a university might take if considering building a digital community around its online collections
- 3 Send staff to the training events offered by the Oxford Great War Archive project on how to engage the community to build up a digital collection



www.jisc.ac.uk

Click to play

Dr Lesly Huxley
Director, Publications and Organisational Development, The Leadership Foundation

Duration 0:47 mins

"The summit is a really great opportunity for leaders and managers wherever they might be in an institution, whether they have an IT responsibility or not, to be aware of some of the opportunities that technology can afford in helping them to meet their goals, whether they be departmental, faculty-based or whole organisation. It's a real opportunity to find out what work has already been done so that they are not reinventing the wheel, and give them a space to discuss some of the challenges that institutions are facing now. We're in a very different world to the one we were in three, four, five years ago. Technology is moving on very quickly, and universities now need to be much more agile in their thinking about how they can maximise the use of technology right across their business."

Dr Lesly Huxley, Director, Publications and Organisational Development, Leadership Foundation for Higher Education

JISC Portfolio for Senior Managers: Employing technology to support your business goals

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