Student Lifecycle Programme

PSS Conference
Friday 1st July 2016

Tim Westlake, Director for the Student Experience

What is the Student Lifecycle Programme?

- A major programme of work to scope out the University's business requirements to support the student journey.

- A business change programme supported by external consultants, KPMG, and **not** an IT project.

Why are we doing this now?

- To support the University's standardisation agenda and realise benefits for staff and students.

- To review how we utilise our core Student Information System

Student Lifecycle Programme – the context

- Student Systems Review (Feb 2015) – chaired by Tim Westlake
- Recommendations approved by University Senior Leadership Team (July 2015)
- Student Systems Review Implementation (Aug 2015) – chaired by Russell Ashworth

1. *To create new organisational structures (incorporating the Student System Office within the Directorate for the Student Experience)*

2. *To align the organisation to a high level business operating model*

	Policy/Strategy	Process	Systems	Data
Accountability	DSE (RBESS for PGR)	DSE	ITS	DSE

Core Student Information System (SIS)

- Since merger Campus Solutions (CS) is the University's Core SIS;
- CS has major upgrade and this triggered Student Lifecycle Programme;
- To support the lack of consistency in business processes, and early challenges around functionality, CS has c1,000 customisations;
- The customisations result in data quality and integrity issues, as well as high support, maintenance and upgrade costs;
- Customisations not necessarily a bad thing, but we need to recognise and quantify both the benefits and associated costs;
- Part of the current scoping work is to understand the way CS is configured, its functionality, and evidence and quantify issues which impact on effective delivery of key business processes.
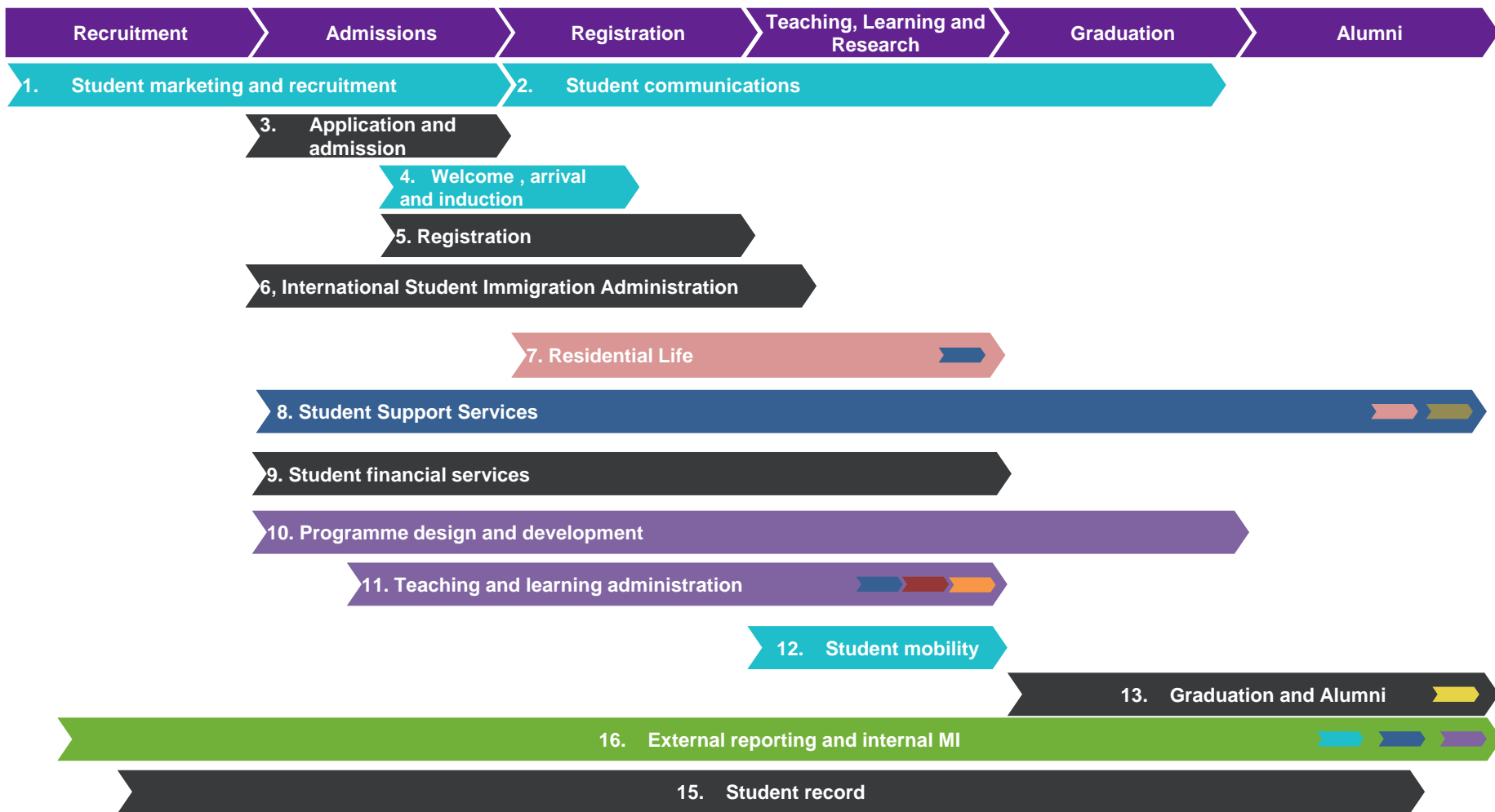
Key questions being explored are what do *we want the student journey to look like* and *can our SIS support any potential improvements identified*?

Student Lifecycle Programme – 3 work streams approved by CITP (Jan 2016)

1. **Student Lifecycle Scoping Project** (full business case to CITP July 2016)
- Mapping and reviewing current processes and develop the business case for a full Student Lifecycle Programme

2. **Student Lifecycle Pilot Project**
(business case to CIPT April 2016)
- Develop the business case to pilot the 9.2 version of Campus Solutions for MBS Worldwide (by Jan 2017) and new D/L programmes

3. **eProg Replacement Project**
- Bringing the existing eProg replacement project into the overall programme of work

If the overall business case is approved, then the 3 streams above will become a single project from July 2016 onwards – lessons to be learnt about linking projects together earlier

Student Lifecycle Process Framework (BOM)

MANCHESTER 1824
The University of Manchester

Recruitment	Admissions	Registration	Teaching, Learning and Research	Graduation	Alumni

1. Student marketing and recruitment
2. Student communications
3. Application and admission
4. Welcome, arrival and induction
5. Registration
6. International Student Immigration Administration
7. Residential Life
8. Student Support Services
9. Student financial services
10. Programme design and development
11. Teaching and learning administration
12. Student mobility
13. Graduation and Alumni
16. External reporting and internal MI
15. Student record

Process ownership key:

- SAAD
- SRID
- TLSO
- DSL
- RS
- DSE
- Library Services
- Directorate of Estates and Facilities
- Division of Alumni and Development Services
- PSO
- RBESS

Business Operating Model

- The Business Operating Model (BOM) is an outcome of the Student Systems Review and is being developed in parallel with the Student Lifecycle Project.

- The BOM classifies high-level overarching processes related to the key activities of the Student Lifecycle.

- It will identify clear areas of action and a process owner who is ultimately responsible for the coordination and management of each process.

- The BOM will be a 'live' document, updated when there is a change to a process. It will also be linked to agreed University policies and strategy.

Indicative example of Process Framework for Application and Admission

- **3.0 Application and admission**
  - *3.1 Monitoring and development of policy related to admissions*
    - 3.1.1. Maintaining and managing changes to T&C of the offer letter.
    - 3.1.2 Reviewing recruitment, admissions and selection policies.
  - *3.2 Managing admissions procedures and duties*
    - 3.2.1 Administration of appeals and complaints
    - 3.2.2 Supporting the admission of minors
    - 3.2.3 Administration of applicants with declared criminal convictions
    - 3.2.4 Supporting the administration of programmes with additional requirements.
    - 3.2.5 Supporting the application process for applicants with a disability
    - 3.2.6 Using contextual data to support admissions procedures
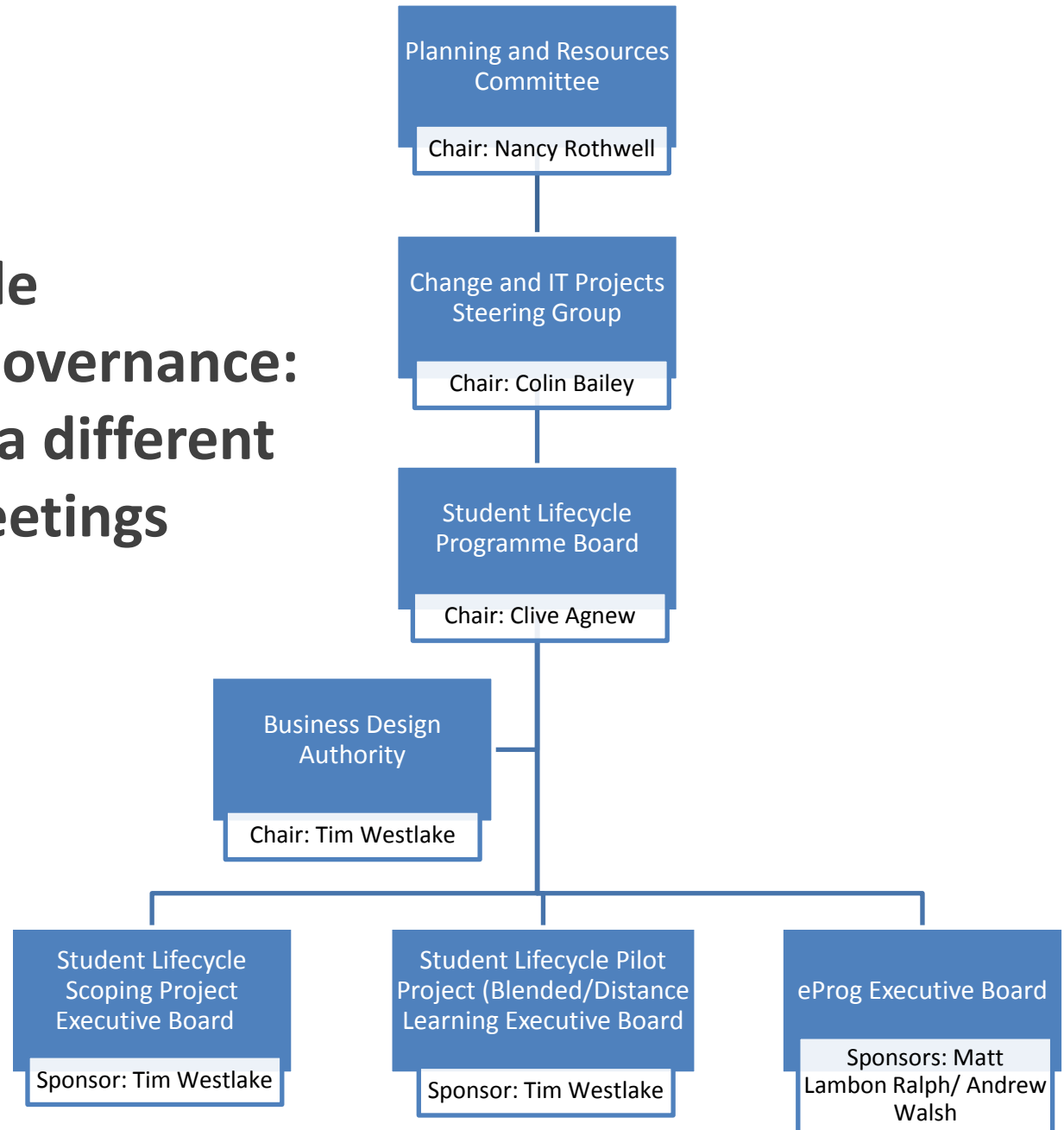   - 3.2.7 Conducting tuition fee assessments
  - *3.3 Coordinating admissions activities by staff in schools/faculties*
    - 3.3.1 Providing information, guidance and advice on admissions processes and procedures
    - 3.3.2 Managing applicant records including document management
    - 3.3.3 Managing procedures for dealing with fraudulent applications

Student Lifecycle Programme – Governance: KPMG brought a different approach to meetings

Planning and Resources Committee

Chair: Nancy Rothwell

Change and IT Projects Steering Group

Chair: Colin Bailey

Student Lifecycle Programme Board

Chair: Clive Agnew

Business Design Authority

Chair: Tim Westlake

Student Lifecycle Scoping Project Executive Board

Sponsor: Tim Westlake

Student Lifecycle Pilot Project (Blended/Distance Learning Executive Board

Sponsor: Tim Westlake

eProg Executive Board

Sponsors: Matt Lambon Ralph/ Andrew Walsh

Student Lifecycle Programme Objectives (signed off by the Programme Board)
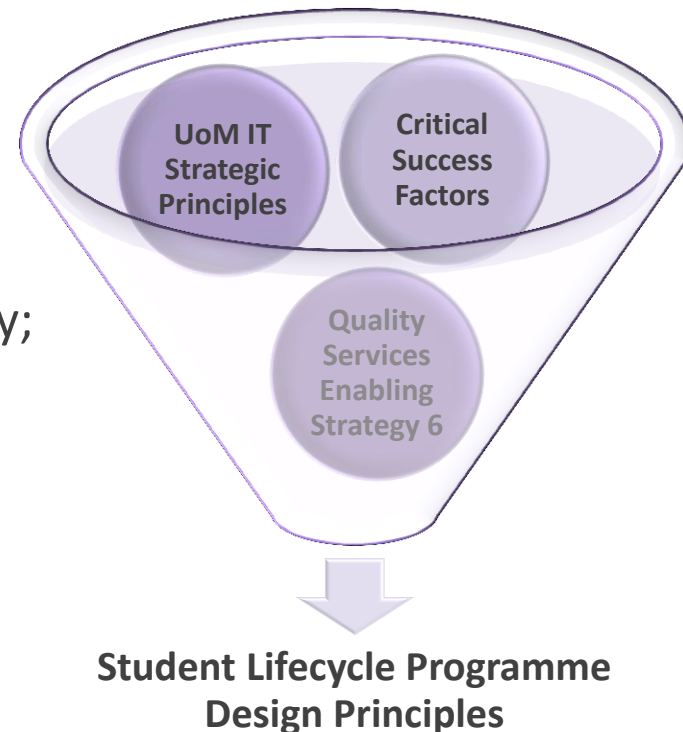
The Student Lifecycle Programme has three key objectives:

- Improve the Student Experience   40%
- Improve the Staff Experience   30%
- Improve efficiency and effectiveness   30%

Student Lifecycle Programme – benefits for staff and students

The following design principles are at the heart of the programme:

- Students should have a seamless administrative experience;

- Students should have a consistent experience regardless of programme mode or year of study;

- Students' access to services should be relevant and timely;

- Core student business processes should be standardised across the university.

UoM IT Strategic Principles

Critical Success Factors

Quality Services Enabling Strategy 6

Student Lifecycle Programme Design Principles

Current State High Level Findings

- The University has no single view of a student across the whole lifecycle;

- The University has fragmented systems architecture with limited IT integration;

- There is a lack of end-to-end business process ownership;

- There is variation in the design of a number of key student forms and interfaces;

- The online user experience for students is sub-optimal;

- The performance of core systems can be poor at key times in the student lifecycle.

44 current state workshops undertaken with **140** representatives from Schools, Faculties and central PSS.

45 students and recent graduates consulted - UG, PGT and PGR (home and International)

Future State Workshops – Key Learning and Outputs

- Process improvements can be implemented by using either "vanilla" Campus Solutions 9.2 functionality or standard configuration.

- An Customer Relationship Management (CRM) system can facilitate the transfer of data across the institution, could track enquiries; change of circumstance and mitigating circumstance requests.

- Workflow tools (within Campus Solutions, a CRM system, or as part of an external application that automates the flow of data between systems) can meet the basic requirements of the proposed process improvements;

- My Manchester can deliver personalised information, communications and services throughout the student lifecycle.

15 future state workshops undertaken with **150** representatives from Schools, Faculties and central PSS.

26 students consulted - UG, PGT and PGR (home and International)

Future state workshops – key learning and outputs

Several of the proposed process improvements do not require systems changes but would be delivered through:

- Reviews of University policy;

- Stricter enforcement of existing policy;

- Transfer or responsibility and accountability for tasks between teams.

15 future state workshops undertaken with **150** representatives from Schools, Faculties and central PSS.

26 students consulted - UG, PGT and PGR (home and International)

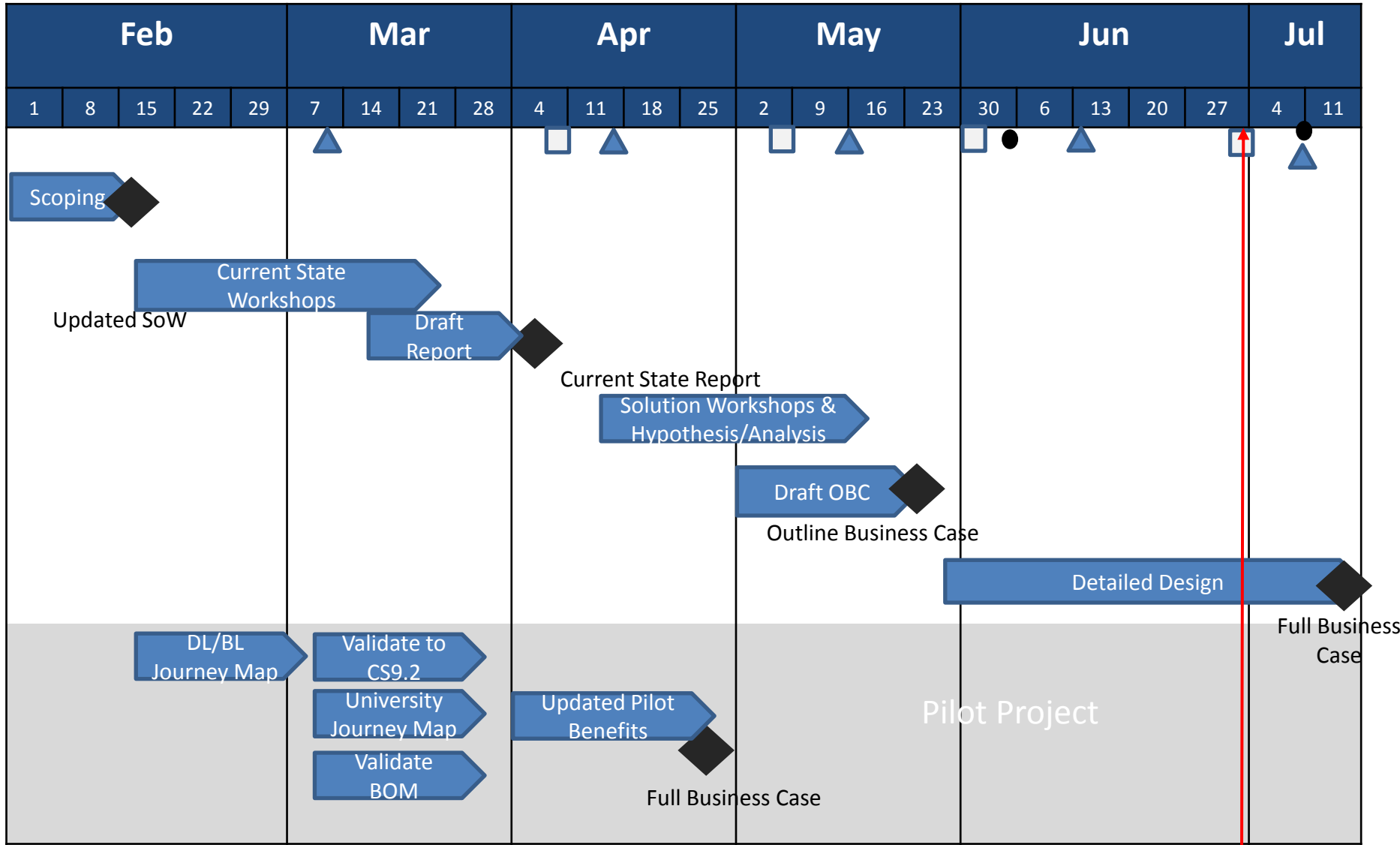# Future state - summary of proposed process improvements

- The implementation of a CRM component to allocate enquiries to the most appropriate member of staff;

- The introduction of workflow functionality to manage admissions, change of circumstance and mitigating circumstances requests;

- Standardising the course unit and timetabling process to provide students with a single, comprehensive view of their taught programmes;

- A move towards engagement monitoring as opposed to attendance monitoring.

The student (customer) journey and service delivery

The aim of this work stream is to identify improvements to the student experience by looking at student (customer) journey and service delivery. It will achieve this by:

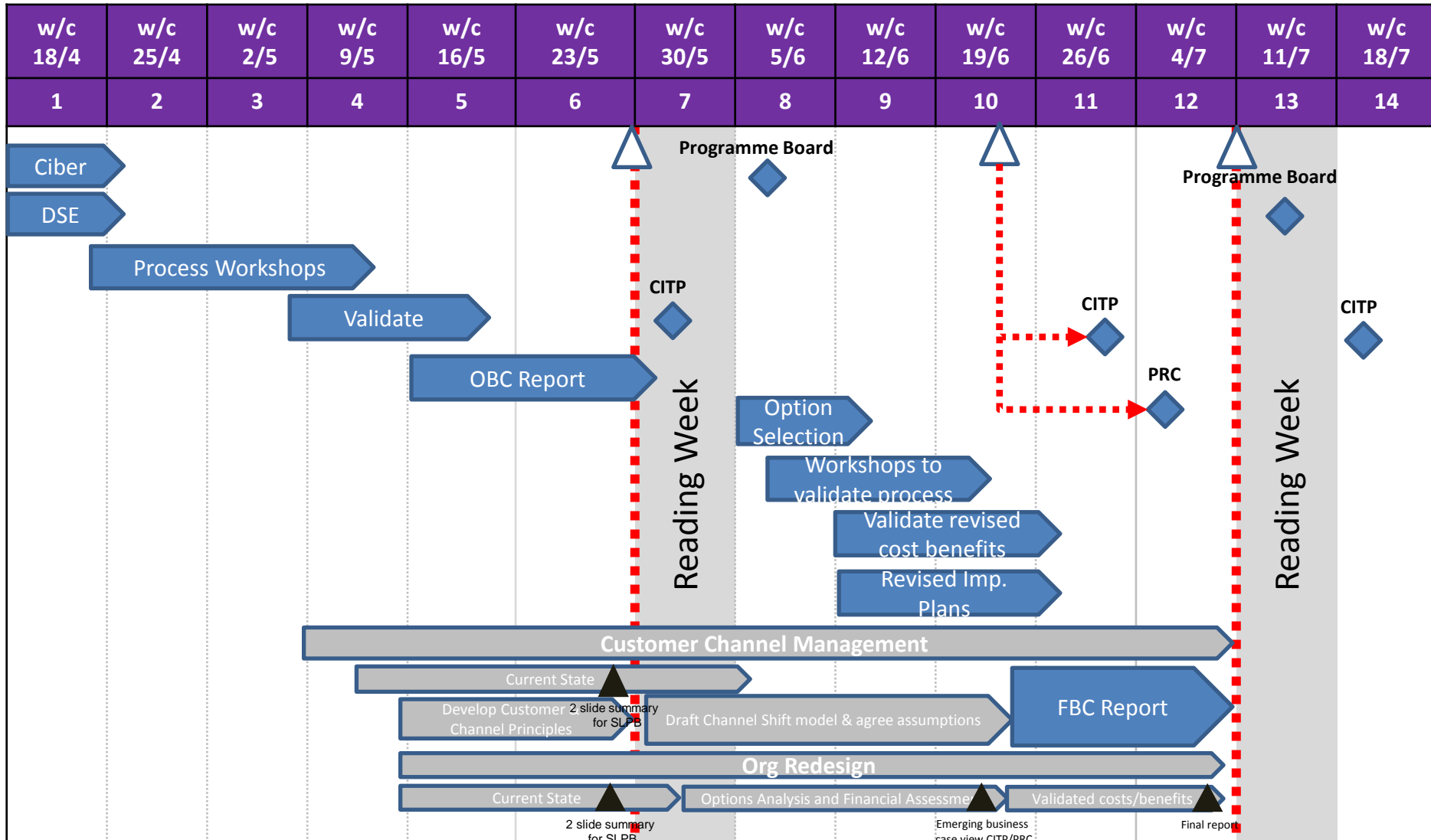- Mapping the existing student experience into visual student journeys for the personas of UG home, PGT international and PGR home;

- Understanding demand upon the University in terms of student groups or segments, the channels used, the services they utilise and by volume;

- Creating a business case to outline the options, costs and benefits to enhance student (customer) journey and service delivery.

Student Lifecycle Programme Plan

	Feb					Mar				Apr				May				Jun				Jul	
	1	8	15	22	29	7	14	21	28	4	11	18	25	2	9	16	23	30	6	13	20	27	4	11

Scoping

Current State Workshops

Updated SoW

Draft Report

Current State Report

Solution Workshops & Hypothesis/Analysis

Draft OBC

Outline Business Case

Detailed Design

Full Business Case

DL/BL Journey Map

Validate to CS9.2

University Journey Map

Updated Pilot Benefits

Validate BOM

Full Business Case

Pilot Project

Key: ▲ Programme Board ☐ CITP ▮ Activity ◆ Milestone ● Planning & Resource Committee

Student Lifecycle Programme Plan

w/c 18/4	w/c 25/4	w/c 2/5	w/c 9/5	w/c 16/5	w/c 23/5	w/c 30/5	w/c 5/6	w/c 12/6	w/c 19/6	w/c 26/6	w/c 4/7	w/c 11/7	w/c 18/7
1	2	3	4	5	6	7	8	9	10	11	12	13	14

Ciber

DSE

Process Workshops

Validate

OBC Report

Programme Board

CITP

CITP

CITP

Programme Board

CITP

PRC

Reading Week

Reading Week

Option Selection

Workshops to validate process

Validate revised cost benefits

Revised Imp. Plans

Customer Channel Management

Current State

Develop Customer Channel Principles

2 slide summary for SLPB

Draft Channel Shift model & agree assumptions

FBC Report

Org Redesign

Current State

Options Analysis and Financial Assessment

Validated costs/benefits

2 slide summary for SLPB

Emerging business case view CITP/PRC

Final report

Student Lifecycle Programme Communications

- **Awareness** raising across the University via StaffNet, a dedicated intranet site and bulletins to all interested staff (distribution c1,400 with average 80% open rate)

- **Stakeholder engagement** with senior colleagues and achieving buy-in to the programme of work. Tim Westlake has attended 14 senior management meetings since January 2016 to promote the programme and answer questions

http://www.dse.manchester.ac.uk/our-projects/student-lifecycle
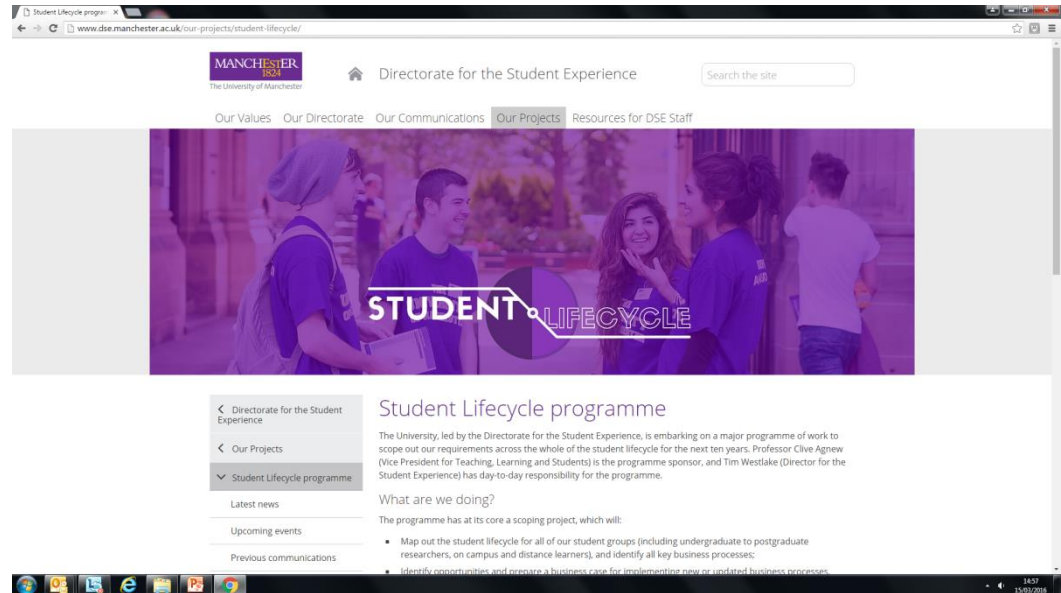
Student Lifecycle Programme – some personal reflections

- Excellent support, at short notice, from across the University
- Working with external consultants has been a very positive experience – but the pace they work at is challenging
- Doing such a complex project as part of the day job is probably not the best way
- As ever, expect the unexpected e.g. 3 ITS Directors since scoping project started
- We need to join together projects earlier e.g. 3 work streams
- The programme will improve the student experience, but not necessarily their satisfaction
- There is consensus for change, the challenge will be delivering it
- The easy bit (has not felt like it) is nearly over!

Student Lifecycle Programme – Next Steps

- Less than 10 working days to complete the full business case
- Business case will demonstrate the benefits of investing £25 million Student Lifecycle Programme
- Pilot has already started to support MBSW, so could argue that decision is actually whether or not to stop the Programme
- If approved, we need to maintain momentum, but the Programme is unlikely to be completed before September 2019
- This is not an IT programme, this is a business-led programme supported by IT
- The Programme is likely to bring changes to everyone who has a role in the student experience
- Standardisation and simplification will be at the heart of the Programme
- For the Programme to be a success we all need to be open to change and work as a single team!

Thank you and questions?