

## University of Glasgow

### Student Lifecycle Project Board

#### Minute of the meeting held on Tuesday 4 October 2011 at 0930 hours in the College Conference Room, Wolfson Medical School

**Attendees:** John Chapman, Carol Clugston, Robert Fraser, Tom Guthrie, Neal Juster, Christine Lowther, Sandy Macdonald, David Newall (Convener), Dorothy Welch

**In attendance:** Pat Furze, Barbara Mueller, Lee McClure, Janice McLellan

**Apologies:** Frank Coton, Stuart Ritchie

#### 1 Minutes of previous meetings

The minutes of the meetings held on 1 September, 9 September and 16 September were noted but not discussed.

#### 2 MyCampus Update

David Newall asked the Board if they could take time at the meeting to discuss the following topics:

- i) issues encountered during registration and enrolment
- ii) steps needed to be put in place to achieve full enrolment
- iii) Project Plan – release of future functionality
- iv) lessons learned from enrolment for next year

The Project Board noted that they have a role to play in the resolution.

Christine Lowther reported on the findings gained from detailed analysis of support calls, feedback from student helpers and from meetings held with Colleges /Schools (SLP11/08). An overview on how the Colleges were progressing was given.

- i) A number of problems had arisen over the past few months and these were listed in SLP11/08. The Board discussed several of these in more detail and noted the following:

- Progression rules /plans would need to be reviewed and tested thoroughly against real data to check validity and ensure issues were identified early enough for changes to be made. Barbara Mueller confirmed that a test environment continues to be available. Eleanor Waugh and Arthur Whittaker were intending to meet with plan builders to talk through actions for the following year. Tom Guthrie asked that any additional resource required to address this activity was provided in a timely manner.
- A clearer form of wording was required in the section relating to SAAS funding to ensure no student was left worried that their fee was outstanding. Christine Lowther confirmed that the Project Team would be revisiting the financial registration process and would ensure that this was part of it.
- Colleges/ Schools had made changes to the fees since the fee table had been issued and fees published in MyCampus. The latest version was as recent as 16<sup>th</sup> September 2011. The Board confirmed that there should be no variation following SMG approval of the fee structure. Neal Juster undertook to speak to Fiona Docherty in RIO.

**Action: NJ**

- Discount and fee waiver information was not showing on some students financial accounts. The process for processing these in future will be the responsibility of the Colleges and RIO.
- Students were unable to enrol on specific courses, such as Modern Languages, where the enrolment process was being managed locally. This problem would continue unless the Schools adapt their processes.
- Erasmus/Exchange students could not enrol on certain courses because pre-requisites were not met. Overwriting pre-requisites was time consuming for Advisers. This needs be rectified before further students arrived in January 2012.
- Timetable clashes were problematic both for students and during the block enrol process. It was noted that timetabling clashes have always happened; however advisers would have over-ridden these. The SLP team was investigating the feasibility of a fix to incorporate a 'check clash' button which would enable students to validate after each class to ensure there were no conflicts in their timetable.
- David Newall suggested that it would be useful to take forward a case study with Joe Sventek who had raised several of the above issues. Barbara Mueller was asked to set up a meeting to include Joe Sventek, Eleanor Waugh, Dawn McKenzie and Phil Sugden to discuss ways in which the process could be improved.

**Action: BM**

- Quick enrolment was not deemed to be quick by the user community. Expectations were that the system would be more intuitive. This meant that advisers, in some instances, were spending more time with students than anticipated. There needed to be reassurance that the enrolment process would not be as time consuming next year for advisers.
- John Chapman asked that the University reconsider its position on the roll out of the new advising system with a view to only changing one major variable at a time. David Newall agreed that this should be discussed with SMG and LTC.

**Action: DN**

- Carol Clugston reported that it was very difficult to know from the data issues where MVLS actually was and how many students they had. Christine Lowther and Barbara Mueller reported that they would be meeting with Caroline Mallon to discuss issues specific to institutes and how plans were attached.
- Tom Guthrie asked how students who had not arrived would be removed from the system. Christine Lowther reported that in the past students would have remained on WebSURF as 'predicted' students until January but this would be tidied up sooner with MyCampus.
- Tom Guthrie asked for more visibility of students' disability information as this information must be viewable by course co-ordinators. Christine Lowther confirmed that this was a security issues which needed to be addressed.

- ii) While Colleges and Schools had reported only small numbers of students who had not yet registered; they all reported somewhat higher number of students who had not yet full enrolled. This mainly affected PGT students, but across all colleges a percentage of undergraduates had

not yet fully enrolled. It was noted that Colleges and Schools would not always expect students to enrol on Semester 2 courses at the start of the year and this was not a requirement.

Although enrolment was low, this was not considered to be a problem for most of the Colleges who were all actively chasing students and expected to have completed enrolment in the next two weeks. The College of Science and Engineering, however, felt they needed additional assistance in resolving the outstanding problems to get all their students fully registered and enrolled. Facilitation of this was under discussion between the College and the SLP Team.

In Education some 50% had not yet enrolled, with many of these not yet having completed registration. This was understood to be partly as a consequence of some difficulties with evidence of sponsorship.

In going forward, it would be important to ensure that the Team looked at the processes for enrolment, focusing on the issues already discussed and the time involved for Advisers.

iii) See item 3 below.

iv) The Board agreed that the focus should be on moving forward and a review of the past few months would have to be credible, robust and accepted by staff. The University would have to commit appropriate resource to ensure any necessary changes to either processes/practices or system could be made. Any review of the lessons learned should be done with integrity, with set ground rules and be honest and open. It would be important to ensure that total staff time spent next year was no more than in previous years using WebSURF and that the student's experience of using the system was more straightforward.

David Newall asked that a small group with academic standing meet to look at the lessons learned. Membership was agreed as follows:

Frank Coton (Chair)  
John Chapman  
Tom Guthrie  
Joe Sventek  
Don Spaeth  
Lillias Robinson

Karen Lee should be retained to assist with this review and to ensure all change management aspects are identified. Janice McLellan would administer the meetings

David Newall would contact Frank Coton and the other members to ensure their commitment and involvement.

**Action: DN**

### **3 Progress update**

Members noted paper SLP11/ 05 and an update on additional functionality was provided by Barbara Mueller. The following was noted:

#### *Student Records Additional Functionality*

- Placement functionality had been delayed by the support required for registration and enrolment so was not used this year. It was ready and would be used the following year.
- The graduation module was under development but would not be ready for December ceremonies which would remain in WebSURF with parallel testing occurring in MyCampus for one ceremony.

- Transcript development was underway and would be ready for December.
- Development of HESA and SFC reporting was underway with considerable resource assigned to this.

#### *Additional Finance Functionality*

- Financial Aid awarding and disbursement were currently being managed in MyCampus. Approximately £1M in stipends was awarded in each of August and September and discretionary and hardship funds were being disbursed as usual. Responsibility for this task was gradually moving to the Colleges and University Services.
- The Financial Aid online application was expected to be available in November.
- SLC processing was being managed in MyCampus by the Student Services Enquiry Team.
- SAAS functionality was expected to be moved to the live environment this week.
- Billing was expected to run next week.
- Direct debits would be taken on the 22<sup>nd</sup> October pending confirmation of a test file from the bank.
- The interface with the Accommodation system was running in the live environment.
- The Library interface would move to the live environment next week.
- Training for Debt Management and applying miscellaneous charges would occur over the next month and responsibility for both functions would be transitioned accordingly.

It was confirmed that dates had been met for functionality that directly affected students. Additional reporting requirements for both Student Records and Finance had slipped due to the amount of time required for registration and enrolment support. This was causing concern as there was now a significant number of requests coming in for reports. The Team would look at devoting more time to this area.

#### *Admissions*

Members noted that UCAS processing went live on 27<sup>th</sup> September. New applications were being loaded on a daily basis, acknowledgement communications had been sent but no offers had been made as of 4 October. GTTR records would be loaded by the end of the week. Training had been conducted during the week commencing 19<sup>th</sup> September. Feedback on the system had been positive.

Training and system testing for Direct Admissions was scheduled for week commencing 10<sup>th</sup> October with the go-live planned the following week. One further modification had been identified to allow offer letters to be sent with pending fee information as the 2012 fees have not yet been agreed or published. The Finance team would need four weeks, following agreement of the fees, to update MyCampus.

#### *CRM*

The pilot of CRM for Enquiry Management has been running for the past 8 weeks. To date, over 4,900 leads have been created in the system of which 2,217 have been resolved with no manual intervention. An interim review meeting has taken place with the business users involved as the end of the pilot was approaching.

Event Management functionality was fully developed and would be used for forthcoming recruitment events.

David Newall queried if more resource was required by the Project Team to ensure that additional functionality was rolled out on time. Barbara Mueller stated that the resource that was in place was adequate, it was more time to transition that was required. Reporting was of concern though and Barbara Mueller asked if additional resource could be drawn in from Planning Services for this. David Newall, Dorothy Welch and Neal Juster would discuss.

**Action: NJ, DN, DW**

Tom Guthrie asked that a decision be made early as to when gradebook would be rolled out. It was important that it was tested fully to ensure calculations work correctly before release. An early release to one school, such as Law, could be considered for semester 2.

**Action: CRL, BM**

**4 Risks**

The Board noted paper SLP11/ 06 and additional risk R046. Pat Furze reported that there was a risk that the advising model would not meet the University's needs and that Advisers would not be identified or trained in time for 2012/13.

**5 Budget**

An update on the Budget was not provided at the meeting due to time constraints.

**6 Next Meeting Date**

The next meeting was scheduled for 3 November at 0930 hours in the College Conference Room, Wolfson Medical School. David Newall asked that an interim meeting of the Board was arranged for 2 weeks time.

**Action: JM**

Clerk's note: Interim meeting has been arranged for 20 October at 11.30 – 1.00, venue to be confirmed.