

University of Glasgow

Student Lifecycle Project Board

Minute of the meeting held on Thursday 3 November 2011 at 0930 hours in the College Conference Room, Medical School Building

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

In attendance: Barbara Mueller, Lee McClure, Janice McLellan

Apologies: Frank Coton

1 Minutes of meeting held on 4th October 2011

The notes of the last meeting held on 4 October were approved as an accurate record. David Newall reported that Pat Furze's contract of employment with the University had ended. It was noted that Stuart Ritchie had resigned as President of the SRC.

2 Matters arising

Members noted paper SLP11/ 09 detailing progress against actions from the last meeting. The following updates were provided:

- ***Fees***

It was noted that there had been several late changes to fees made over the summer after the fee structure had been approved by SMG. Neal Juster confirmed that once approved there should be no subsequent changes unless agreed with SMG. There would be more rigorous monitoring and control of this in the future. Ongoing issues regarding differing fee levels for different sponsors and part-time students in Education were being dealt with and Christine Lowther confirmed that the team was dealing with any problems highlighted to them. Robert Fraser instructed that where individual arrangements had to be made then these must be processed as discounts rather than changes to the fee structure to ensure that the financial information is accurately reflected on students accounts. David Newall asked that a policy paper on fees was prepared and taken to the meeting of SMG in December. The report should detail how fees were set, how discounts were to be applied and the approval process to be followed should a change to the fee structure for a degree programme. Christine Lowther undertook to prepare and a draft in conjunction with Neal Juster.

Action: CRL/NJ

It was noted that some students in receipt of stipend payments in the College of Science and Engineering had been getting variable amounts paid to them every month. John Chapman would ask Pat Duncan to provide examples of students where payment amounts were differing month on month.

Action: JC

Stipends for Research Students were tied to the University's financial year and therefore reflected on the system as 10/12th of what the student was expecting for that year of study. The remaining 2/12th would be payable in the next year of study. This was confusing for students.

- ***Lessons Learned Task Group***

The membership of the Lessons Learned Group, convened by Frank Coton, was noted. Following the last meeting of Project Board, the membership had been extended to include Fred Cartmel (Chief Adviser, Social Sciences) and Eleanor Waugh (SLP Team).

- **Reporting**

Additional resource would come from Jacqueline Boyden in Planning Services, however backfilling was proving difficult. Neal Juster, Dorothy Welsh and David Newall would discuss the possibility of releasing someone from RIO to join Planning Services for a few months.

Action: NJ, DW and DN

All other matters arising had either been addressed or would be dealt with later in the meeting under separate agenda items.

3 **Progress update**

Christine Lowther updated members on progress.

Colleges and Schools were reporting that registration and enrolment was in a much better position. Ongoing support issues continued to be dealt with and where appropriate the SLP team was also providing ad hoc queries.

The Board noted the following:

- **Student Financials**

Advanced notification of Direct Debits would be issued later this week, with collection taking place two weeks later. Some issues had been experienced with getting data for testing. Students would be able to spread amount over 7 months or make a double payment. Billing, SAAS and SLC were all in production. The process of financial aid awarding had now been transitioned to the Colleges and RIO with 80 people having been trained. Miscellaneous charges and bench fees were still to be rolled out and those who required trained would be identified. Looking forward, the fee table for 2012/13 would require updating for the Direct Admissions System.

- **Admissions**

UCAS was working well and once the security for reporting had been resolved this processing would be rolled out to RIO.

- **Student Records**

Absence Co-ordinators were being identified within Schools and Research Institutes. Tom Guthrie commented that some concern had been raised following the training as to how this would work in practice, specifically attendance monitoring in labs. The importance of both attendance monitoring and direct admissions processing working smoothly was noted to ensure user acceptance. Tom Guthrie agreed to provide more specific feedback in relation to managing student attendance.

Action: TG

David Newall asked Barbara Mueller to provide an update after the HoASA meeting which had been arranged to discuss the notification process for absence reporting.

Action: BM

- **Exam mark recording**

Helen Reid was working with SLP in relation to Grade Roster. User Acceptance Testing (UAT) was scheduled for week commencing 28 November aiming for completion by the first week in December. Staff would use a similar process to uploading results to WebSURF; either direct entry or spreadsheets. David Newall asked for a full report to be prepared covering the results of testing which would be shared with the Principal and SMG.

Action: CRL

- ***Interfaces***
Interfaces for the Glasgow School of Art and Strathclyde University would be available later in the month. Some interfaces were being run manually and would require to be automated.
- ***Reporting Priorities***
The work required for the HESA return for Dentists/Medicine has been completed. Work was ongoing in relation to SFC and FTE counts.
- ***Training***
Adviser training had been well attended with some sessions being offered in the evening. Refresher courses for various aspects were also being run over lunchtime.
- ***CRM***
The evaluation of the pilot activity was underway and the Board would be given an update at the next meeting. The team were also looking at the requirements for support.
- ***Speed of response/ performance***
Performance continues to be monitored. The batch process which was being run daily in the background at approximately 11.30am has been analysed and optimised. The team would be reviewing all background jobs to ensure no rogue processes and discussing the possibility of using an advanced analytical tool for the future.

Sandy Macdonald was confident that the team had poor performance problems in hand although David Newall voiced concern that local problems still existed. David Newall asked Sandy Macdonald to ensure that there was a network of people around the University who would actively monitor and report any degradation of performance to the SLP team.

Action: SM

It was also reported that additional testing would be carried out this month to make sure that the system could cope when the exam results came out.

- ***Library Access***
A small number of students were still having difficulty accessing the Library and these students were being directed to the Student Services Enquiry Team for resolution.
- ***Permissions***
Permissions and security access had been raised a number of times and it was clear that a business process was required for approving access. The Team was looking at using SharePoint for processing business as usual access requests. At present staff are being given access on completion of training. Access issues specific to MVLS were being progressed in conjunction with Caroline Mallon. Elsewhere, permission and security access was being dealt with until a longer term solution could be put in place. It was noted that the team would be carrying out a review of access permissions, in the future, with the Colleges and University Services.

Carol Clugston commented that work continued in resolving the problems encountered by the Research Institutes; PGT plans had been sorted and PGR was ongoing. Studentships have followed the plan rather than the supervisors which they need to do, so at present it would appear there were no PGR students in the Research Institutes. The records for some students had migrated with more than one supervisor showing at 100% in one year, this would be reviewed with the Graduate Schools to ensure that the records were corrected.

- ***Academic Advisement reports***
No problems had been reported to Christine Lowther. David Newall asked that this be checked with Chief Advisers in the General degrees as it was thought that some issues had been noted.

Action: CRL

- ***Reporting and recording 'no shows'***
Information was now coming in from Colleges for those students not progressing and this would be updated before the cut off date for the Early Return. The team was looking at a process for rolling students back out of Campus who were classed as 'no shows'.
- ***Erasmus/Study Abroad***
David Newall asked if the issue regarding Erasmus students and their prerequisites had been resolved. Tom Guthrie confirmed that this was still an issue and needed to be fed into the Lessons Learned Group. It was noted that numbers for the January intake were not as large. In future, there needed to be a way of allowing them to choose courses ahead of coming to Glasgow; however this would need to be completed manually for January.
Barbara Mueller confirmed that SLP were looking at how to resolve clashes and looking to see if an element of checking could be built into the system so that students could verify clashes as they went along. Additional resource would be required, Barb Mueller would estimate how much.

Action: BM

4 Project plan

Preparation work was being done on updating the plan to include the remaining outstanding work and points from the Lessons Learned Task Group. Resource requirements, including those required for ongoing support and change management would also be built in. Specific areas that the team was working on included:

- ***Direct admissions***
Training had been completed and a detailed user acceptance plan for staff and students had been prepared. Readiness meetings with Colleges and Schools did not always have the right people in the room for sign off and the Team were looking at ensuring this did not happen again. The expectation was that sufficient people would have performed UAT by early December. An issue regarding bench fees and checklist for offer letters would be run past Graduate Schools. The timing of go-live for PGRs in January was of concern and the team needed to tease out with the Colleges if this went ahead or was put back. Some concerns had been raised in relation to incorporating bench fees in the offer letters. The team were looking at how checklists could be used to resolve this. The solution would be discussed with the Graduate Schools. There was concern that the go-live would now be part way through the admissions cycle and whilst most PGT processing is completed by RIO, PGR processing was carried out by the Graduate Schools. There were differing views around the Colleges and this would need to be teased out before a final decision would be made. This might result in a pilot. There would also need to be data migrated from the legacy systems. It was agreed that a decision would be taken at the Board meeting in December.

Action: CRL

- ***Gradebook***
The concept of piloting Gradebook had been discussed previously. Since then two members of the SLP team had attended an Oracle workshop which covered the ongoing development of functionality for Marks and Exams. Michael Arthur had reported that the functionality being developed better suited our requirements; however timescales for release were not yet known. [REDACTED] Oracle Vice President for Education, would be visiting the University on Friday 11 November and Christine Lowther planned to discuss timescales with him then. It was agreed that the decision on how to proceed would be delayed until the December Board. At this time the possibility of piloting Gradebook in the School of Law should be considered as this would need to start in January. Christine Lowther would also pass details of the [REDACTED] meeting to Tom Guthrie.

Action: CRL

- ***Upgrades and bundles***

The team were planning to install Bundles 20 to 23 before Christmas. Bundle 24, which included changes for DLHE, could then be installed in January/February 2012.

- ***Reporting***

The priority at present was the SFC Return. Heads of Finance and Planning Services were also concerned about FTE count. The team was looking to link the FTE count to the calculation used in the SFC return. There was some concern as to when this information would be available, in particular for the November Budget Meetings. The expectation was that the SFC return would be ready for December. Planning Services would also work with the SLP to ensure the data required for the RAM would be available.

The use of a 'quick and dirty' FTE for November had been suggested by Neal Juster. Christine Lowther agreed that this could be done but concerns had been raised by the College of Social Sciences who had a lot of part-time Education students as to how the 0.5 estimate would reflect. Carol Clugston reported that there was frustration among colleagues that reporting was not high on the SLP agenda and something as basic as FTE figures did not appear to have been thought about. Robert Fraser reported that he would be meeting with Frank Lynch regarding the RAM. Data should be used from the SFC report to feed into the RAM, where possible. Neal Juster confirmed that they did not want to replicate the RAM as it was at present however the SFC count may not be worth the same.

Christine Lowther reported that the query tool could not yet be rolled out and another way for ad hoc queries would need to be found for the time being. Sandy Macdonald confirmed that options were being considered at present and he was working with Michael Arthur to agree a recommendation on how best to proceed.

5 Lessons Learned

Three open meetings had been held to date with Advisers and Administrators. Frank Coton had also met with the Project Team. A SharePoint site had been set up for staff comments and would close on 4 November. So far there had been 54 comments with over 400 people viewing. Some of the comments were from groups and very lengthy. An email box had been set up for student comments and had received approx 180 emails. A research student of Don Spaeth's had been brought in to review the student feedback and Anne Mitchell would filter staff comments. Further meetings of the group would be held during November with a report being produced during this time.

A number of matters were raised at these meetings which were set out in paper SLP11/ 10 from the Lessons Learned Task Group. It was noted that:

- Access to write their own queries - There was concern over the lack of an equivalent for the current bi-query capability. David Newall asked that Michael Arthur look into whether BI/Query could be used as an interim measure. Sandy Macdonald reported that in theory it could be done.
- Student ID cards and photos – the specific issue was that there seemed to be student records on the system that did not have photographs. Staff were unclear as to whether or not students would then have registration cards for use at exams. David Bennion had confirmed that this would not be an issue as there was already a process in place for this.

6 Risks

Members noted the updated Risk Register, paper SLP11/ 11. Janice McLellan reported that Risk 44 had been retired and the probability of Risk 34 had increased given budget conversations. Risk 46 had been added to cover the risk relating to the advising model.

Concern was raised about replacement resource and how difficult it would be to secure. Sandy Macdonald confirmed that worst case scenario would be that we go back to Oracle US; however this would be expensive to do.

7 Budget

Sandy Macdonald tabled a copy of the budget and the Board noted the three scenarios presented. The first scenario was driven by the end date of the implementation and working on the theory that the end date was 31 December 2011 the outlook would be a total cost of £12.5m. This was likely to be unrealistic as developments were ongoing.

Scenario two set out the financial outlook if the current SLP Team was kept together until the end of April 2012 which would bring the project in at a cost of £13.7M (set against the approved budget of £14.1M). This was heavily dependent on the plan and could be top heavy. Taking into account the things still to be done, lessons learned etc, Sandy Macdonald thought there would be a question mark of having a 'hard stop' at the end of April.

Scenario three set out the outlook if the whole team was employed to 31 August, and showed the total cost rising to £15M. Sandy Macdonald did not think there would be a need for this and thought that the end result would be somewhere between scenario two and three, keeping some people on after April until the end of August. Until the project plan was finalised it would be difficult to say.

John Chapman reminded the Board that there would be enhancements and new requirements resulting from the Lessons Learned Activity. Extra resource was likely to be needed to sift the information and it would be better to overshoot the budget to ensure the objections of the community were addressed. Robert Fraser commented that we also need to make sure we deliver the functionality that we set out to deliver even if we overshoot.

8 Any Other Business

Barbara Mueller sought clarity on CMIS and if the roll out had been pushed back a further year. David Newall confirmed this was correct.

9 Next Meeting Date

The Board would next meet on 5 December at 1500 hours.