



Edinburgh Napier
UNIVERSITY

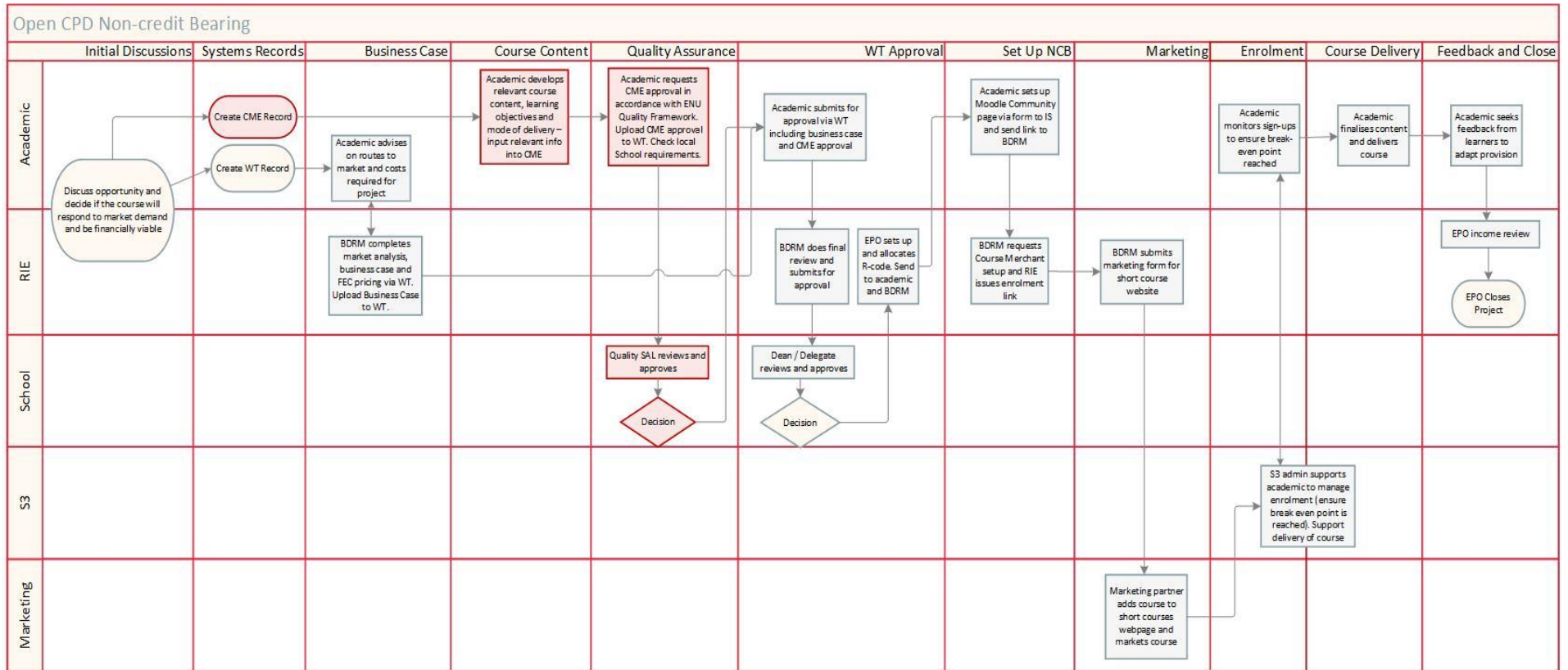
Continuing Professional Development (CPD) Process

Process document to support the development and delivery of short course provision at Edinburgh Napier University (ENU).

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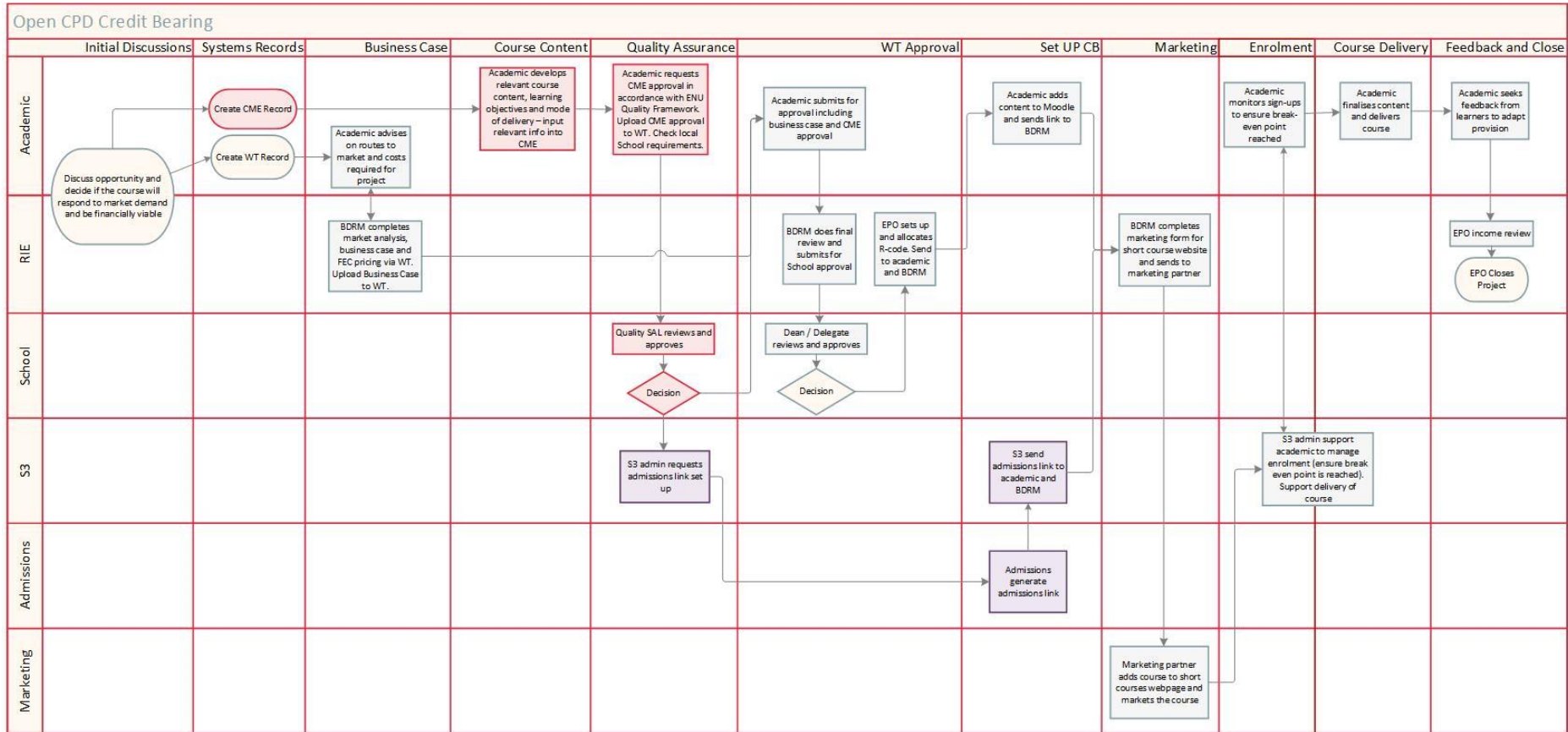
Process Flow Open CPD: Non-credit Bearing



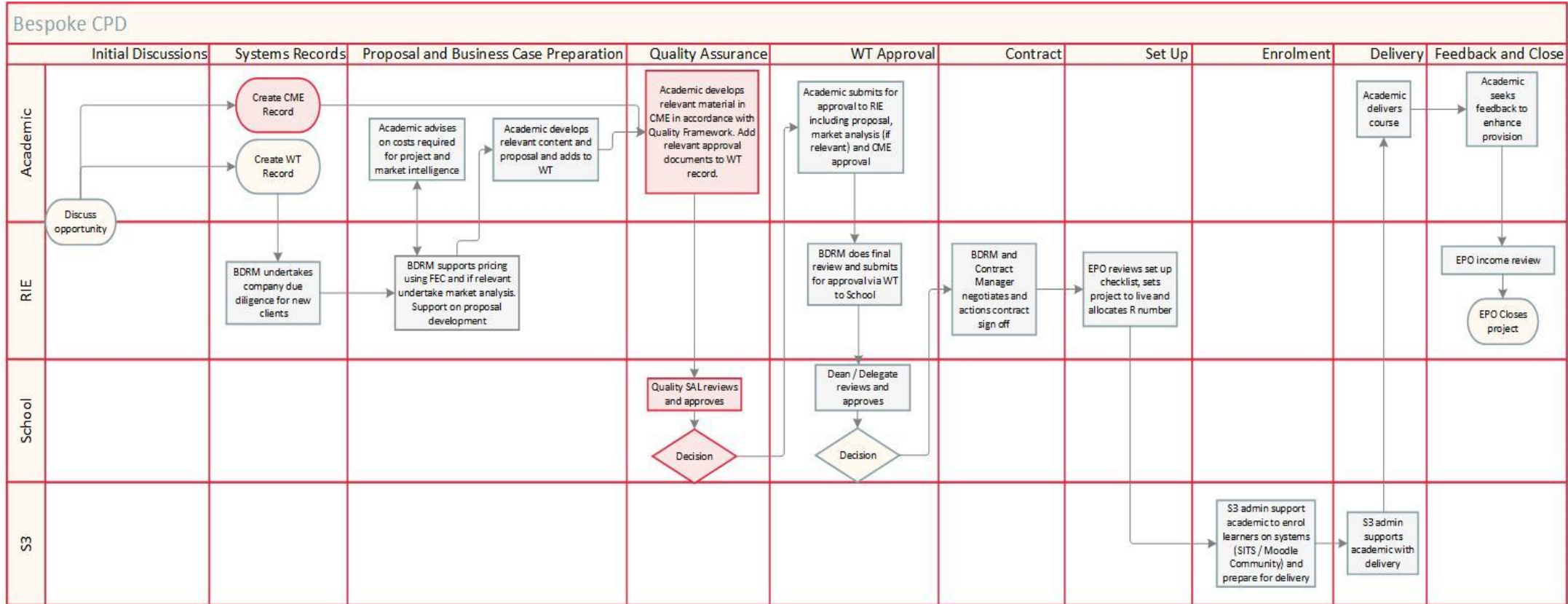
Glossary of Acronyms for Process Flows

BDRM	Business Development and Relationship Manager	R-Code	Worktribe Reference Code (Relating to budget folder)
CME	Curriculum Management Environment	RIE	Research, Innovation and Enterprise Department
EPO	External Projects Officer	SAL	School Academic Lead
FEC	Full Economic Costing	S3	School Support Services
NCB / CB	Non-credit Bearing / Credit Bearing	WT	Worktribe

Process Flow Open CPD: Credit Bearing



Process Flow Bespoke CPD



Purpose



The Continuing professional development (CPD) provisions delivered by Edinburgh Napier University (ENU) inspire the local, regional, national and global workforce to be effective and productive. Skills development enables our global learners to contribute to their community and economy. Through our CPD provisions, we deliver against the United Nations Sustainable Development Goal 4 to *ensure inclusive and equitable quality education and promote lifelong learning opportunities for all*¹. Empowering people with skills also delivers against relevant government policies on economic growth, innovation and skills development.

The growth of CPD is also a key priority of the University and aligns to the strategic objectives outlined in the ENU Strategy:



This process document outlines the necessary steps required to develop and deliver a CPD provision. The process flow charts represent relevant roles and responsibilities across the different ENU functions and further details below elaborate on each of the relevant phases.

Whilst there is flexibility and nuances at a School level, this process provides transparency and uniformity at an institutional level. It ensures high quality provisions are developed and provides agility to rapidly respond to market demand to sustainably grow income.

It is beneficial for academics to engage in the development and delivery of CPD. It diversifies the academic activity which enhances individual's skillsets; it generates income which is accounted for promotional purposes; CPD is a pathway to impact for REF case studies; it solidifies an academics position as an expert in the field; and through insights from CPD learners, there could be an opportunity to enhance research and knowledge exchange activities.

Certain CPD activities (including non-credit bearing bespoke and open provisions) are included in ENU's Consultancy and Commercial Activity Framework. This means if academics are undertaking this activity out with the Workload Allocation Model (WAM), so if undertaken over and above workload, academics could be eligible for an additional payment via PAYE (payroll) or through a personal research account (PRA). More information can be found on the RIE intranet - [Consultancy and Commercial Activity Framework \(napier.ac.uk\)](#)

¹ United Nations Sustainable Development Goals, SDG 4 , [Goal 4 | Department of Economic and Social Affairs \(un.org\)](#)

Definition



CPD is defined in accordance with the Higher Education Statistics Agency (HESA) industry standard definition. Importantly, this informs the Higher Education Business and Community Interaction Survey which is the main vehicle for measuring the volume and direction of interactions between UK higher education providers, business and the wider community. Only activity that aligns with the following definition can be categorised as CPD:

'Training programmes for learners already in work who are undertaking the course for purposes of professional development/up-skilling/workforce development'.²

CPD activities include:

- ✓ Open short courses developed in response to market demand
- ✓ Bespoke short courses that respond to a specific organisational need
- ✓ Credit-bearing modules from a formal course
- ✓ An externally recognised short course
- ✓ Career development courses
- ✓ An academic programme based in or around work-place practice that is specifically designed (e.g. workplace MSc or PG Certificate)
- ✓ Post-qualification CPD activity (e.g. up-skilling in healthcare)
- ✓ A post-Foundation degree 'top-up' programme

What type of CPD do you want to deliver and what is ENU award? As per the grid below, CPD provisions can be credit or non-credit bearing, delivered as short non-certified workshops up to MSc level. Mode of delivery can be face-to-face, blended, online or self-paced. Provisions can be advertised on the ENU website (open) or delivered to a closed group for a specific client (bespoke).

	Non-credit Bearing	Credit Bearing
Open	Workshops / Courses (with no certification), Certificate of Credit, Certificate of Completion	Certificate of Credit, any other University award but normally PG Certificate or MSc
Bespoke	Workshops / Courses (with no certification), Certificate of Credit, Certificate of Completion	Certificate of Credit, any other University award but normally PG Certificate or MSc

CPD Examples

ENU CPD Awards Grid

² HE-BCI record 2018/19 - General guidance on Table 2: Business and community services, 2019, www.hesa.ac.uk/collection/c18032/hebci_b_table_2

Provision Development and Delivery

The following steps (which each align to the process flows) are required to develop and deliver a high-quality provision. Depending on the type of provision you wish to deliver, will inform the relevant processes and support required. Please familiarise yourself with each step and undertake relevant tasks sequentially to ensure a smooth route to market:

1. Initial Discussions and Systems Records



At the earliest possible point, academics must engage with the Research, Innovation and Enterprise (RIE) Office via their School's Business Development and Relationship Manager (BDRM). RIE will provide support throughout the development process of the provision and signpost the academic to relevant ENU departments who might need to be consulted. Contacting the School Support Service contact (as below) is also important so you can outline and request support required at the delivery stage. These discussions will ensure that timescales can be set and resources planned. For SFC Upskilling, contact Sally Smith (S.Smith@napier.ac.uk).

The academic is responsible for starting a project on the institutional research management system, called Worktribe (WT). An introductory overview can be [found here](#) and RIE can provide further support. At the same time, the academic must start a provision record on the curriculum management environment system ([CME](#)). The School Quality contacts can provide advice on this system and process.

Business Development and Relationship Manager (BDRM) Contacts

- School of Arts and Creative Industries: Jane Ning: j.ning@napier.ac.uk
- School of Applied Sciences: Maggie Reid: m.reid@napier.ac.uk
- School of Computing, Engineering and Built Environment: Matt Burdge: m.burdge@napier.ac.uk and Cathy Higginson: c.higginson@napier.ac.uk
- School of Health and Social Care: Maggie Reid: m.reid@napier.ac.uk
- The Business School: Jane Ning: j.ning@napier.ac.uk

School Support Quality Contacts

- School of Arts & Creative Industries: SACIquality@napier.ac.uk
- School of Computing, Engineering & the Built Environment: SCEBEQuality@napier.ac.uk
- School of Applied Sciences: SAS.Quality@napier.ac.uk
- School of Health & Social Care: SHSC.Quality@napier.ac.uk
- The Business School: tbsquality@napier.ac.uk

School Support Service Contacts

- School of Arts & Creative Industries: sacibusinesssupport@napier.ac.uk
- School of Applied Sciences: CPD_SAS@napier.ac.uk
- School of Health & Social Care: CPD_SHSC@napier.ac.uk
- The Business School: businessandleadership@napier.ac.uk
- School of Computing, Engineering & Built Environment:
 - Applied Informatics: aibusinesssupport@napier.ac.uk
 - Built Environment: bebusinesssupport@napier.ac.uk
 - Computer Science: csbusinesssupport@napier.ac.uk
 - Cybersecurity & System Engineering: cssebusinesssupport@napier.ac.uk
 - Engineering & Maths: embusinesssupport@napier.ac.uk

2. Proposal and Business Case Preparation



It is the academic's responsibility to develop a high-quality provision that is financially viable. The BDRM will support with expert knowledge to inform the CPD business case including market insights for market analysis purposes, costing, pricing and potential risks. During these preparation stages, as the provision plans takes shape, it is vital to engage relevant departments where support will be required such as Admissions; School Support Service; Marketing; Information Services (IS); and the Department of Learning and Teaching Enhancement (DLTE). For example, the School Support Service Administrator will support with checking room availability, which might influence the planning of delivery dates.

For bespoke CPD, on occasion a tender submission is required. Academics, supported by the BDRM, should ensure a high-quality proposal to enhance the chances of winning funding. Where we are the only organisation submitting a proposal to the client, some high-level market analysis is still required to shape the course and ensure accurate market rates.

Business Case

The business case will comprise market analysis and financial costings and provides a justification for undertaking the development and delivery of a new provision. It evaluates the benefit (market demand), competitor analysis, costs and ultimately the final price point for the provision.

Market Analysis

Open CPD provisions require a full market analysis to ensure a clear understanding of the market and demand for an open CPD provision. This analysis will be led by the BDRM through consultation with the academic and School's Marketing Partners, where relevant.

If possible, it is also beneficial to include primary research - this might include canvassing the market; undertaking discussion with relevant professional bodies; or reflecting on any insightful feedback acquired from previous similar provisions. A range of insights will ensure development of an attractive and high-quality provision.

This market analysis will also inform the School's Marketing Partner who will lead on developing marketing campaigns.

It is important to note that marketing campaign planning will start as early as possible, but live marketing can only take place once the project is set up, allocated an R-code and has a relevant enrolment link.

Market Analysis Considerations:

- ✓ Introduction
- ✓ Brief overview of the course and objectives
- ✓ Target market: an accurate description of the target market including as many defining features as possible
- ✓ Market size: an accurate estimation of potential number of learners
- ✓ Competitor analysis: who is the competition and what are they charging?

Financials: Costing and Price Point

To accurately cost a CPD provision, Worktribe (WT)³ must be used. The School's BDRM will work with the academic to accurately calculate the cost of development and delivery as well as determine the price point per individual learner.

Academics are required to provide a genuine and accurate prediction of expected time required for projected development and delivery. This full-time equivalent (FTE) percentage is then reflected in the academic's Workload Allocation Model (WAM). Adopting this approach for costing will ensure that we comply with UK's international obligations on subsidy control⁴ which is mandatory.

All Open CPD provisions need to generate enough income to reach break-even point at a minimum. Thus, in advance of approvals, a cost-per-head and required number of students will be calculated and included in the business case. Where possible, and if the market can bear it, the BDRM will encourage a profit uplift and update Worktribe accordingly.

For bespoke CPD, a similar approach will be followed for the costing, however the client will dictate how they wish to receive the pricing / quotation. In some cases, this will be a per learner amount, but in others it might be a flat fee.

3. Course Content Development



The academic will be responsible for developing high-quality course content that is relevant and well received by the CPD learners. Initially, this will start with the information required to ensure that all the fields on CME can be completed. Content creation should be prepared well in advance of delivery to ensure enough time for tweaking and preparation. Where any content needs to be added to Moodle or Moodle Community, this must be planned in good time to ensure a good student experience. The learner should have ample time to read this content in advance of the course starting.

ENU's Department for Learning and Teaching Enhancement (DLTE) can help support and advise on how to develop CPD specific content. Please contact Sam Illingworth (S.Illingworth@napier.ac.uk) for more information.

4. Quality Assurance (CME)



All ENU provisions require quality assurance and scrutiny. This is relevant for credit and non-credit bearing and depending on the specific output of the provisions (ranging from no certificate to MSc Degree), there are differing requirements. It is the responsibility of the academic to ensure that they review the ENU Quality Framework⁵ to ascertain the requirements relevant to their provision and this should be done as early as possible. The Quality Framework is the University's definitive source of information on ENU's approach to academic quality assurance and enhancement. Academics also need to familiarise themselves with local requirements for initial School approvals - e.g. SLT sign-off or School Provision Committee.

³ Using WT will ensure that Full Economic Costing (FEC) is calculated which utilises the Transparent Approach to Costing (TRAC) methodology (used across the UK higher education sector).

⁴ UK's international obligations on subsidy control: 2021, <https://www.gov.uk/government/publications/complying-with-the-uks-international-obligations-on-subsidy-control-guidance-for-public-authorities>

⁵ <https://staff.napier.ac.uk/services/dlte/quality/qualityframework/Pages/qualityframework.aspx>

All short course provisions need to be approved via the Curriculum Management Environment (CME) system. Each School has their own Quality School Academic Lead (SAL), as well as professional services staff who can help support the process of quality approval (please see contacts on page 8). Evidence of quality approval via CME for all provisions, needs to be evidenced via a document upload to Worktribe in advance of submission for approval. Please ensure that this document includes the course code.

5. Approvals



Once the provision record has been approved on CME, relevant documents uploaded and other actions completed, the academic is required to submit the project for approval via Worktribe (WT). The BDRM is then responsible for doing a final check before submitting it to the Dean of the School (or delegated School Approver) who has who has final authority to sign off on the project. They will ensure that quality approval has taken place (evidenced from the CME download), and that the proposal is strong and the costings are accurate. The BDRM can advise the School approvers where relevant. Approvals need to be given in advance of any quotation being submitted to a client or project work starting.

6. Project Set Up



Once approvals are complete and/or funding won, RIE's External Projects Team will set up the live project on Worktribe (WT) and allocate a relevant financial code (also known as an R-code). Whilst this can be tracked on WT, it will also be communicated, via email, by the External Project Officer (EPO) to the academic, School Support Service and BDRM. All finances for the CPD provision will be rooted through this R-code to provide a transparent overview of the projects spend and income.

The type of provision will dictate the next steps in terms of provision set-up, enrolment and if marketing is required.

For open non-credit bearing CPD, the provision will need to be set-up on Moodle Community and also on Course Merchant (to process payments). RIE will set-up the provision on Course Merchant for enrolments. If a learner requires an invoice, they will contact the school support service administrator.

For open credit bearing CPD, the provision will need to be set-up by the academic on Moodle (via a Unidesk request) and enrolment will be managed through SITS. Thus, an admissions link is required. School support service administrator will request set up of the course and this is actioned by admissions, who then send return the admissions link. The key point of contact in admissions is Laura Hutchison (shortcourses@napier.ac.uk).

For bespoke CPD, the BDRM is responsible for undertaking contractual negotiations with the client. Once the contract is signed off, an R-code will be allocated. The requirements from the client will dictate where and how the course should be set up for learners to access, if required, for example via Moodle Community or Moodle, with registration on the University's student records database (SITS).

External Project Officer (EPO) Contacts

School of Arts & Creative Industries: Morag Cherry: m.cherry@napier.ac.uk

School of Applied Sciences: Colin Scott: C.Scott2@napier.ac.uk

School of Computing, Engineering & Built Environment: Debbie Ratcliffe:

d.ratcliffe@napier.ac.uk and Jill Williamson: j.williamson@napier.ac.uk

School of Health and Social Care: Shona Sharp: s.sharp@napier.ac.uk

The Business School: Andreena Wheelaghan-Duff: A.Wheelaghan-Duff@napier.ac.uk

7. Marketing



The School's Marketing Partner will use the information from the completed marketing form (appendix 2) to upload new open courses to the ENU short courses webpages. The course page will be signed off by the academic and then go live. Based on the market analysis undertaken, the Marketing Partner will support to ensure that the course reaches the right audiences via relevant channels. Support from the academic, who is well positioned to reach out to their own contacts in their area of expertise, is also key.

Marketing will produce social media graphics and promote the course online organically. Where 'paid for' marketing budget has been included and approved in the business case, the Marketing Partner will lead on this activity.

The School Support Service Contacts (as per page 8) are the point of contact on the short courses webpage for general enquiries regarding enrolment and delivery of the provision. For some open CPD courses, learners might require an individual invoice. If this is expected, an MS form will be set up by School Support Service administrator for learners to provide their invoicing information.

Please note, in terms of timescales, it is advised that all courses need at least three months for marketing. This will increase the chances of ensuring that a break-even point is reached so the course is financially viable. No courses can go to market unless the relevant steps have been taken as outlined above and the marketing form is fully completed.

8. Enrolment



The School Support Service administrator will support the academic with applicant enquiries and enrolments on to the course, as well as the student journey. The type of provision will dictate where enrolments can be monitored - e.g. Moodle or Moodle Community. The academic will be supported by School Support Service Administrator to monitor the enrolment numbers.

Each individual course needs to reach the break-even point in accordance with the business case, to ensure financial viability. It is recommended that at least four weeks before a course is due to take place, a decision needs to be made by the School to decide if the course has recruited enough learners to proceed, or if it should be postponed to a later date or cancelled.

For bespoke CPD provisions, there is occasion where a class list is provided by the client and these learners are added to the relevant system by the School Support Service administrator.

9. Course Delivery



In preparing for the delivery of the course - whether online and in-person, the academic will be supported by the School Support Service Administrator. These requirements will have been discussed during the planning stages and might include on-the-day logistics, such as name badges; delegate packs; banner tops; coordinating catering; meet-and-greet; and preparing certificates (depending on the type of course being delivered).

The academic is responsible for having the content ready to deliver and should plan to capture feedback as soon as the provision is delivered.

The EPO team will support financial management of the provision through Worktribe. For bespoke courses, they will invoice the clients in accordance with the agreed contractual payment schedule. For open courses, they will ensure that the relevant and expected income is reflected against the R-code. For all courses, they will ensure that income is cross charged to the Schools.

Feedback and Close



It is recommended that all course leaders follow up with the learners to capture honest and constructive feedback. This is not currently a mandatory requirement but it can substantially help develop future iterations of the course and enhance the quality for the future. The Department of Learning and Teaching Enhancement (DLTE) intranet page website has some good resources and they host training sessions to get the best feedback possible. You can also contact Sam Illingworth (S.Illingworth@napier.ac.uk) for more information.

Once the delivery and feedback is complete, the EPO will ensure the correct income amount is showing against the project on Worktribe and close the project.

Appendix 1: New Short Course Development Summary

A summary of required activities with reference to additional guidance:

Activity	Summary
Worktribe Set Up	https://staff.napier.ac.uk/services/research-innovation-office/rms/Pages/RMS-Introduction.aspx
Quality Approval (CME)	In accordance with the Quality Framework and via CME System https://staff.napier.ac.uk/services/dlte/quality/qualityframework/Pages/qualityframework.aspx https://napier.akarisoftware.com/curriculum/index.cfm
DMP	Complete a data management plan as necessary - if you are collecting data that you plan to use for research and publishing purposes.
Business Case	BDRM will work with academic and in some cases marketing partner to prepare a business case.
Finance (R) Code Set Up	Once quality, business case, Worktribe approval and contract signed (if relevant) are completed, R-Code will be generated
Moodle Set Up	Moodle (integrated with SITS) is for credit bearing and Moodle Community is for non-credit bearing. IS set up the course pages and academic completes relevant form: https://blogs.napier.ac.uk/learningtechnologyhub/moodle/moodle-servers/
Course Merchant Set Up	For non-credit bearing courses, payment taken through e-commerce website, Course Merchant, once Moodle Community page is live and R code allocated, the Course Merchant payment link can be set up. https://www.coursemerchant.com/
Website Page	Once Course Merchant link or admissions link is set up then the marketing form can be sent to the Marketing Partner (appendix 2) - the new course will appear on our short courses website and marketing can commence. https://www.napier.ac.uk/study-with-us/short-courses/continuous-professional-development

Appendix 2: New Course Website Template

For new CPD courses to be added to the website and obtain support from the Marketing Team via a marketing campaign, please complete the following form with support from your School's BDRM and Marketing Partner. Please note, courses can only be listed online once they have been approved via CME for quality purposes, Worktribe and allocated a finance R code.

Each section below corresponds with the details that appear on the website and please use the following link for an example of a current live courses [Short Courses](#).

General Information	
Worktribe ID	
Project R Code	
Course Dates	
Enrolment Link	<i>Admissions link for credit bearing provisions Course merchant link for non-credit bearing provisions</i>

Webpage Information		
Course Title		
Overview	Course USP	<i>What makes this course stand out from competitors? This will be in bold at the top of the course page and should be an attention grabber. Approx. 20 words.</i>
	Course Overview Text	<i>This should be high level information and draw out the selling points of the course so the user wants to read more. Approx. 180 words.</i>
Course Details	Course details	<i>More general details and module titles. Approx. 250 words.</i>
	How you'll be taught	<i>Approx. 30 words.</i>
	Assessments	<i>If relevant? Approx. 50 words.</i>
	Academic WT Link	<i>Please insert link and ensure all information there is up to date</i>
Entry Requirements		
Learning Objectives		
Fees / Funding	<i>Please indicate if it is expected that any invoicing of learners will be required. If so please include the relevant S3 email contact.</i>	
VAT Status	<i>Please indicate if 0% or 20% VAT</i>	
Image	<i>Please consider if you have any relevant images to use that are adequate specification and copyright. If not, the marketing team will supply relevant images</i>	

Marketing Campaign Information	
Target Market	<i>Who is this course for? (seniority, industry type, location, career stage)</i>
Known Routes to Market	<i>How will we access the target market? Please suggest any relevant networks or marketing channels that would provide a good portal for promotion</i>
Key words	<i>Please share any key words that people may use when searching for this course</i>
Case Study	<i>Optional: Consider if you have a case study example to share</i>
Other	<i>Consider any other information that will support the marketing campaign</i>

Appendix 3: Compliance and VAT Factsheet

In some cases, whilst the provision aligns with our institutional definition of CPD, it is out with the HMRC definition of CPD⁶ (which they refer to as vocational training) and thus we need to apply VAT. Vocational training covers training or re-training and work experience for: paid employment; voluntary employment in areas beneficial to the community as a whole; education; health; safety; welfare; and charity work in general. Vocational training occurs where trainees attend courses, conferences, lectures, workshops or seminars and the purpose is to prepare for future employment or add to their knowledge to improve their performance in their current work.

Vocational training does not occur where (through counselling, business advice or consultancy) the purpose is to improve the working practices and efficiency of an organisation as a whole. Thus, the benefit of CPD needs to be specifically for the individual. It is also important to note that if we deliver online CPD that has no human contact element, this is classed as a digital service and incurs VAT. Further, facilitation of workshop sessions is a professional service and incurs VAT.

Provision Type	VAT 20%	VAT 0%
Open CPD: Face-to-face or blended learning where there is significant 'human contact'		✓
Open CPD: Online delivery where there is zero 'human contact' and as such defined as a digital service	✓	
Bespoke CPD: Where the benefit is to the company on the whole rather than the individuals	✓	
Bespoke CPD: Where the benefit is to the individuals within the company more so that the company on the whole		✓

⁶ More guidance can be found on the Vat notice 701/30: <https://www.gov.uk/guidance/vat-on-education-and-vocational-training-notice-70130#section5>. If a specific case is unclear, please contact our institutional compliance manager Libby Hulme.