

Sustainable Futures Annual Report Academic Year 2013-2014

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Summary

Sustainable Futures has established itself as a function crucial in supporting change, through facilitated workshops, coaching and training, rapid improvement events and internal consultancy.

Sustainable Futures has achieved its goals for 2013-2014 (see [Table 1: Goals \(Looking back on 2013-14\)](#)) and looks forward to further developing support for the University in 2014-2015. See [Table 2: Goals \(Looking forward to 2014-2015\)](#).

Looking forward: 2014-15 Goals

Programme and Portfolio Development

- Ensure relationships are maintained through a time of organisational change
- Support our Strategy 2020 ambitions

Activity

- Continued success
- Aim to complete at least one RIE

Product Development

- Develop “end-to-end” client support, integrated with Academic and Business Liaison service provision
- Complete trial of Continuous Improvement Partners programme

Administrative Development

- Successfully integrate as part of Academic and Business Liaison team product delivery
- Successfully integrate as part of Academic and Business Liaison team records management

2013-14 in Review

It is important to note that last year's achievements are in the context of significant pulls on staff resource to support institutionally important work. See [Strategic Support](#).

"I can only provide positive feedback.

Sustainable Futures provide an excellent means of facilitating change in a supportive environment, with experts who provide guidance and support to those who have been tasked with implementing the change.

I would recommend the team to anyone who is considering a major change to processes"

Organisational Position

Academic year 2013-14 offered a number of moves in line management of the team, from Peter Wallace head of Planning & Intelligence, to David Cloy, Deputy Secretary, and finally to David Telford in Information Services' Academic and Business Liaison team.

Currently Sustainable Futures is positioned well in a team offering a range of skills in change, process, and project management and while considerable resource is committed to the Web Review project (phase one due for completion September 2015) we retain some capacity ready to respond to activity as part of the Strategy 2020.

Indicators of success

Annual Survey

Our Annual Survey indicates staff continue to view our work as positive, increasingly so in areas relating to students, external partners, university values, and the principles of Sustainable Futures.

However, staff perceive that there has been less of a positive impact on their work, we consider that this is due to the perceptions of increase in workload for finance staff as a result of the online matriculation process, an issue due to be addressed in stage 2 of the project, for implementation before September 2015. See [Table 5: Annual Survey Comparative Rankings](#)

Verbatim comments in this survey are positive, and provide constructive feedback, notably around experimenting with new approaches, and ensuring sufficient resource is provided to allow for implementation. See [Table 6: Annual Survey Verbatim Comments](#)

Institutional Spread

One of our ongoing aims is breadth of impact institutionally. We measure this through keeping a contact record where we meet with individuals or where individuals have taken our online training module. We use this to support us in reaching all areas of the University.

This record indicates that we have made contact with **280 individual staff**, representing **every Faculty, School and Professionals service**, or between 15% and 20% of our workforce.

This excludes a significant number of staff who were involved through the strategic areas of activity worked on, where Sustainable Futures team members met with a broad spread of staff across every University area, and at every level.

Product Activity

Sustainable Futures has continued to delivery products under its four categories, however, it should be noted that there is a broad crossover between each of these. For an overview of all project activity see [Table 3: Product Delivery 2013-2014](#)

Biggest impact projects included:

- ✓ Completely redesigned the **Examinations Administration** process
- ✓ Transformed how the School of **Nursing** administer **Practice Learning**
- ✓ Redesigning and supporting the implementation of **online matriculation** for all students

Coaching/Training

6 Coaching assignments were completed, including support for Matriculation Implementation, and Academic Event Advertising.

Consultancy

11 consultancy assignments were undertaken, with 9 of these at close/complete stage at the end of the academic year. These include support for the Academic Year Week 1 review, and the exams administration process.

Process Review

10 Process Review assignments were undertaken, with 6 of these at close/complete at the end of the academic year. Headline projects include redesigning the PEEP process, and finalising the online Financial Aid process.

Rapid Improvement Event

1 Rapid Improvement Event was completed, for online Matriculation.

Benefits

Many activities have produced data indicating improvement. Key achievements are highlighted here, fuller impact assessment available on request:

Exams:

- Improved staff efficiency supported move to **3 site (home campus)** exam diet
- **2500 fewer student trips to unfamiliar campuses**
- 1/3 more space for timetabling
- 10-20% reduction in handovers
- More time for academics to mark scripts
- Increased exam paper security

Matriculation:

- **3573 students** who did **not need to attend** face to face 'Matriculation'- 75% reduction compared to previous year
- Only 965 students needed to attend in 'Matriculation' Week (now fresher's week)
- Move to **3 site (home campus)** 'Matriculation' (now called face to face checks) supporting student experience, programme focus and faculty led induction week.
- Average student matriculation journey **reduced from 57 minutes** (this would have been greater as UG and PG were combined so would have led to greater queueing) **to 25 minutes**- a 44% reduction Running matriculation
- venue costs reduced by circa £11,000

Academic Learning Event Advertising:

- **Reduce** number of places **duplicating advertising** events from 5 to 3
- With plans to consolidate further in 2014-15
- 5-10 minute time saving on each course run (circa 100 courses a year)

Nursing Practice Learning Placements:

- **Every Student** now receives a **placement checklist leaflet** which they say really helps them prepare for placements
- **Every mentor** will be receiving a **mentors checklist** to support them delivering a consistent experience NES

- **Nursing Education Scotland** are circulating checklists nationwide as example of **best practice** - improving our reputation nationally
- The **NHS Central Legal Office** have recommended all other Unis and NHS Boards adopt the **Edinburgh Napier SLA template**- improving our reputation nationally
- Recommendations for 3 year projections for student numbers accepted by the Scottish Government
- 1 year allocation of practice learning now provided, this is a step towards 3 year allocation of practice learning (aspired to in our workshops), enabling the **students to better plan** their year ahead

Online Financial Aid:

- Well **over 1000** of the 1236 applications for financial aid were **made online** for Academic Year 2013-2014
- Process will be **completely online for 2014-2015** and is working well, with some ongoing development.
- For each application we expect a reduction in cycle time of circa **20%** - an improvement of **3.5 days** from application to receipt (as noted in last years end of year report)

50th year celebrations IDEA idea generation session:

- **24** out of 53 generated ideas taken forward as part of the 50th year anniversary

Academic Strategy Themes facilitated sessions:

- Facilitated academic board members to agree **5 academic themes**

Environmental Management System:

- **Supported EMS through coaching** to engage people in EMS
- Environmental team achieved silver status in July 2014

Additional Activity

Alongside the standard products offered by Sustainable Futures we have developed new services and provided strategic support on special projects

Strategic Support

Sustainable Futures resources continue to be key to the University, for deployment to support areas that are strategically important. While not aligning directly to a single Sustainable Futures Product, these provide opportunities for team members to bring their specialist skills to support the institution, and include significant and high level contact with colleagues.

- *Planning Round*
 - Following the departure of the then Head of Planning and Intelligence, Andrew McKendrick from the team stepped up between March and June to support this **institutionally critical** process.
 - Taking approximately **60% of Andrew's time over the period**, it resulted in submitted operational plans from all faculties and directorates, completed consultation programme,
 - Deliverable statements agreed with faculties and directorates, worked with finance to deliver indicative budgets aligned to submitted plans, feedback to faculties and directorates on plans and budgets, signed off corporate plan for AY 14/15,
- *Website review*
 - This project began in July 2014 and aims to **refresh the corporate website** in phase 1 and staff intranet in phase 2 (post Sept 15).

- It is predicted to take up to **1 full time staff resource** for business analysis, consultancy and project management for phase 1 completion before start of academic year 14/15.
- *Improving Operational Processes and Procedures project*
 - Beginning in Semester 3 2013-14 this project aimed to deliver improved operational processes and procedures, right across the University, to support the delivery of our **Strategy 2020: Building Success** ambitions.
 - Sustainable Futures offered support for this programme primarily in terms of **design and delivery of consultation sessions**, before handing over to the project's external consultant for report completion.
 - Closing in October **2014 Steve Yorkstone was committed approximately 80%** to this work between its launch and the completion of the facilitated consultation process.

Working Together Conversations

We conducted consultation with senior staff to inform activity going forward, referred to as "Working Together Conversations". See [Table 4: Working Together Conversations, top 10 areas raised](#)

Continuous Improvement Partners Programme

This programme aims to enhance continuous improvement through a programme of **training, coaching and action learning sets**.

Designed as part of a distinction-winning Master's thesis here, we now have four participants are now engaged on the programme, for completion end of academic year 2014-2015.

Records Management Training

The team have worked with the University Records Manager to integrate good principles of process management into our Records Management Training.

External Impact

Team objectives include ensuring that alongside internal impact we remain active in external networks, to enhance our reputation, provide reference points to good practice, and develop experience we can bring to enhance our performance internally. See [Table 7: External Impacts](#).

We were able to take advantage of external contacts including a site visit from Jon Tudor, the Lean Management Journal's Editorial Director, who commented on assessing our activity (primarily in Student and Academic Services):

"[In] non-manufacturing examples, this visit was probably the best I've seen"

Appendices

Table 1: Goals (Looking back on 2013-14)

2012-13 Goal	Comment/Evidence
Programme and Portfolio Development	
<ul style="list-style-type: none"> Continue to build working relationships with the new Principal and executive members to support strategic activity 	✓ Multiple Activities have been commissioned from the University Secretary and Deputy Vice Chancellor.
<ul style="list-style-type: none"> Opportunities afforded by the upcoming strategic review 	✓ Significant support has been provided to the "Improving Processes and Procedures Project"
Project Activity	
<ul style="list-style-type: none"> Continued Success working with the university to maximise impact; efficiency, effectiveness and quality 	✓ Feedback from participants in events and in annual survey indicates a successful year
<ul style="list-style-type: none"> Completion of Rapid Improvement Event (RIE) 	✓ Matriculation RIE successfully delivered, resulting in a new online process implemented in a remarkably short period of time- we supported through another commissioned piece of work- coaching/Project management shadowing
Product Development	
<ul style="list-style-type: none"> Developing further "coaching" product to potentially include all training activity 	✓ Successfully delivered additional face to face training session, and developed enhanced coaching service, "Continuous Improvement Partners"
<ul style="list-style-type: none"> Developing further "Rapid Impact Analysis" product to reflect the timescales of activity in the University Sector 	✓ Retitled this product "Consultancy", and delivered a number of successful products, including; Personal Emergency Evacuation Plan review
Administrative Development	
<ul style="list-style-type: none"> Continuing to develop back office operations to support delivery 	✓ Worked with Governance Services to ensure back office administration complying with best practice document management
<ul style="list-style-type: none"> Involvement in the Universities Graduate Trainee Scheme 	✓ Successfully managed Graduate Trainee, who achieved a distinction for MSc Dissertation based on the action-research design of the "Continuous Improvement Partners" programme

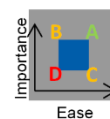
Table 2: Goals (Looking forward to 2014-2015)

NOTE: This is pending confirmation from line management




















2014-15 Goal	Possible Indicator
Programme and Portfolio Development	
<ul style="list-style-type: none"> • Ensure relationships are maintained through a time of organisational change • Support our Strategy 2020 ambitions 	<ul style="list-style-type: none"> ▪ Portfolio of successful activity is maintained ▪ Positive feedback from staff leading change towards Strategy 2020
Activity	
<ul style="list-style-type: none"> • Continued success • Aim to complete at least one RIE 	<ul style="list-style-type: none"> ▪ Evidence of positive impact ▪ Feedback on annual survey ▪ Completed RIE
Product Development	
<ul style="list-style-type: none"> • Develop "end-to-end" client support, integrated with Academic and Business Liaison service provision • Complete trial of Continuous Improvement Partners programme 	<ul style="list-style-type: none"> ▪ Published processes for integrated Academic and Business Liaison services ▪ Successful completion of activity using skills across Academic and Business Liaison ▪ Feedback from Continuous Improvement Partners ▪ Evidence of impact from Continuous Improvement Partners
Administrative Development	
<ul style="list-style-type: none"> • Successfully integrate as part of Academic and Business Liaison team product delivery • Successfully integrate as part of Academic and Business Liaison team records management 	<ul style="list-style-type: none"> ▪ Demonstrated use of shared process for product/project delivery ▪ Demonstrated use of shared records management procedures

Table 3: Product Delivery 2013-2014

Work Undertaken 2013-2014 (by product type and stage at academic year end)













Product: Coaching			
4.Close	Coaching Matriculation Implementation	Coaching/Project Assurance for Implementing Matriculation changes identified through the RIE	
	Learning Disabilities National Model Work	To provide supporting role/methodology in implementing the LD model within the school and NHS	
5.Complete	Academic Learning Event Advertising	Supporting improving advertising process.	
	NSA Sport Society Online Membership Development	Coaching role NSA to help them develop online membership & payment process	
	Online Business School	Advice given in facilitating discussions.	
6.Hold	Research Funding Cradle to Grave	Support colleagues in process map/review of research and commercialisation processes	
Product: Consultancy			
3.Product	International Programme Administration (IP)	International Programme Administration (IP)	
4.Close	Academic Year Week 1 Review	Facilitating Session with key stakeholders to design week 1 induction Sept 2014	
	Document Management	Supporting Records Management through process training session	
	Paperless UCAS Go-Live	Support with the UCAS UG team in implementing paperless admissions process	
5.Complete	Academic Strategy Themes	To facilitate sessions to help decide academic themes for new academic strategy	
	EMS Integration Consultancy	Small scale exploratory discussions on integrating EMS(Environmental Management System)	
	Exam Administration Process	Exploring options for improving exams process	
	PDR Review Day	Facilitated day to summarize feedback from HR staff around developing PDR system further.	
	Supporting ILM - Going for Gold	Support processes for operationalisation of ambition to meet ILM Gold Status	

	Timetabling (Space Utilisation)	Potential RIE to further optimise time-tabling / space utilisation process		
6.Hold	Health check Proposal Support	Looking at Sustainability of Health check initiative		
Product: Process Review				
2.Planning	Mobile device process review	Review of mobile device provision		
3.Product	Improving Operational Processes	Part of Strategy 2020 Improving Operational Processes		
	Practice Learning Project	Optimising experience for students on placement from the School of Nursing, Midwifery and Social Care		
	Website Review	Review of Website Use and Delivery System		
4.Close	International Staff Travel	Plan to review process to and time & effort, while providing better reporting on international travel		
	Module Descriptors	Supporting OVPA in redesigning the process for creating/updating module descriptions.		
	PEEP	Exploring whether we can further develop evacuation processes for students with disabilities		
5.Complete	EDC ILM Process Review	Process review intervention for Edinburgh Development Connections in relation to the collaborative provision of ILM programmes		
	Financial Aid	To map, review and create new online application process for financial aid in order to remove requirement for paper application and improve student experience.		
	L&D Contact Database	Small Review process led by Graduate Trainee		
6.Hold	Strategic Alliance Management	Support process design element of project to implement Strategic Alliance Management.		
Product: Rapid Improvement Event				
5.Complete	Matriculation	Exploring possible process review for implementation September 2014		
Product: Referral				
5.Complete	Mobile Phone Process	Support colleagues in improving processes to support staff using mobile telephony.		
Product: N/A				
0.Pipeline	Timetabling Development Project Support	Support for Moira in Scoping Timetabling Development Project		

6.Hold

[EN]GAGE systems support	Possible activity to support improvements to sports centre systems use	
CPD Improvement	TBC	
Customer Services Mini-RIE	(blank)	
IDEA Support	Provide support for IDEA	
Management Accountants Business Planning Tool	Implementation of new system and processes	
Redundant Equipment Process	(blank)	
School Disability Contacts	Improving processes for School Disability Contacts	

Table 4: Working Together Conversations, top 10 areas raised

Rank	Item		Comment
1	Support for Research Students/Graduate Office		Not actioned due to awareness of upcoming organisational changes
2	Improve Support for flexible/distance learning		Not actioned due to awareness of upcoming organisational changes
3	International Student recruitment and Journey		Not actioned due to awareness of upcoming organisational changes
4	Week1		Informed workshop
5	Module Descriptors change process/management		Informed consultancy
6	E-services Strategy		Being progressed through University Secretary
7	Overseas support unit		Informed activity following Improving Processes and Procedures project
8	Enquiry Management		Informs action on Web project. Referred to line management
9	CRM strategy		Under remit of pre-existing review
10	Customer Service offering		Taken forward by research and subsequent actions in identified area



Activity undertaken



Decision taken to hold



Referred to existing activity

Table 5: Annual Survey Comparative Rankings

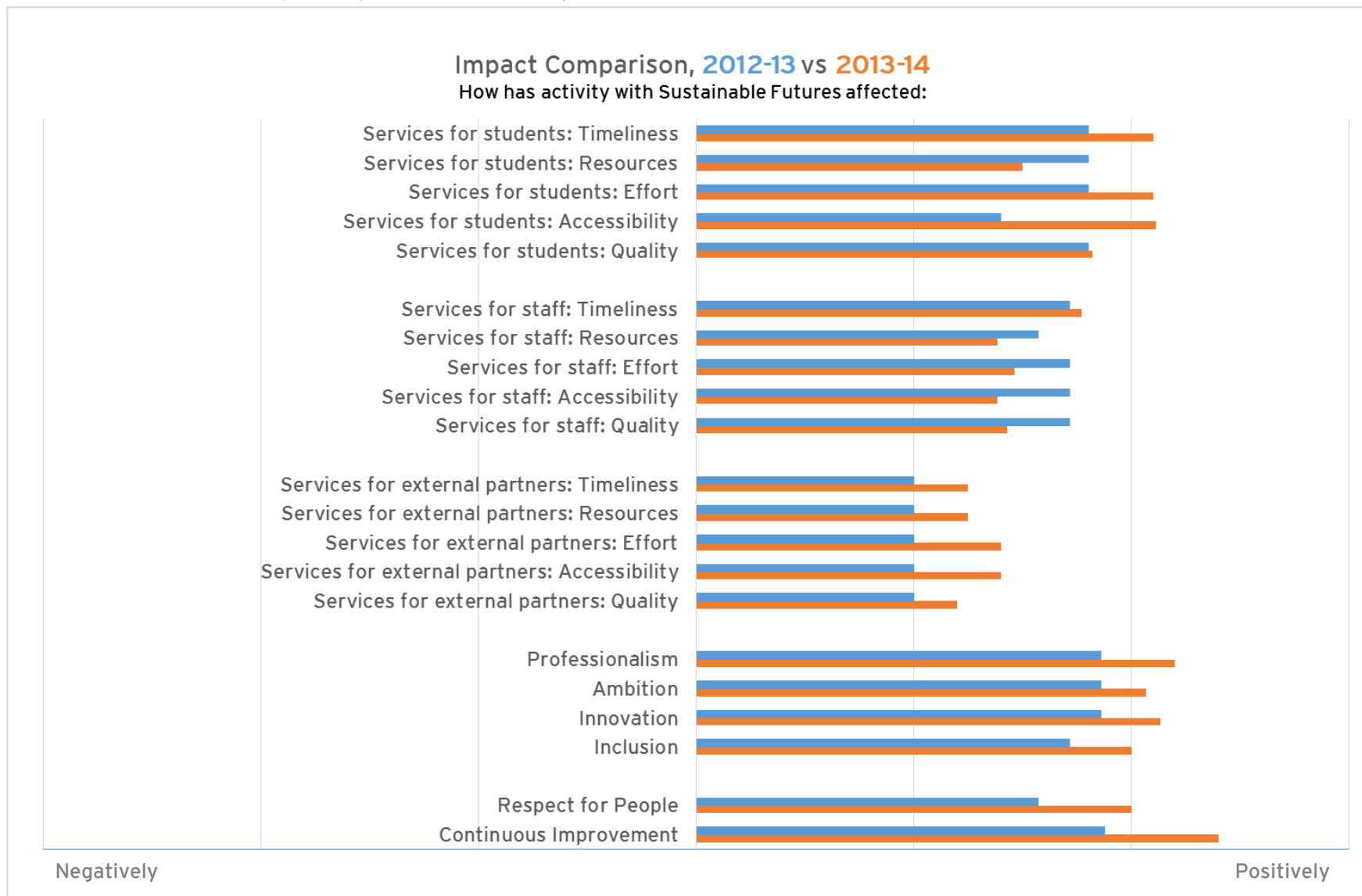


Table 6: Annual Survey Verbatim Comments

Thinking about your involvement with Sustainable Futures, what ideas do you have for doing things differently next time?	Thinking about your involvement with Sustainable Futures is there anything else you would like to add?
	The comments under "services for staff" is more about follow up activity being stalled as opposed the work undertaken on the day.
The things I would do are outwith the purview of the Sustainable Futures team around scope of project and ability to mandate action rather than leaving a very slow bureaucratic setup to take things forward.	My involvement has been very positive. The project was more about feasibility and therefore seeing any direct benefit is difficult and at this stage tangential. However, the process of going through the process for staff has been very positive and as a number have said cathartic. The team exhibited great flexibility of approach throughout the project and within individual sessions to pull the best from staff.
	I can only provide positive feedback. Sustainable Futures offers an excellent means of facilitating change in a supportive environment, with experts who provide guidance and support to those who have been tasked with implementing the change. I would recommend the team to anyone who is considering implementing a major change to processes.
Reconsidering the scope of the work and adapting the expected output accordingly; I'm specifically thinking about output of a full plan in order for a Project to be initiated OR an understanding that the full plan still needed to be developed.	Closer links with an ongoing project may be beneficial moving forwards, but clearly there are resource implications for that.
More robust promotion of information relating to new services being implemented.	Information relating to groups formed to deliver continuous improvements. Who is doing what? Clear mapping of groups formed working to achieve specific areas of improvement.
	I would just like to say that working with the team is everything that it should be. The team are professional, friendly, accommodating and collaborative.
Nothing comes to mind balance of strong facilitation and open facilitation is good	No
From my perspective I need to give greater consideration to staff and financial resource	Has been an extremely positive experience. The support and evidence led approach has been invaluable and the enthusiasm

required to support the process improvements that we are seeking to put in place.

transferred onto, and support given to team members, has been greatly valued.

Being involved with Sustainable Futures has provided us with the means to evaluate our processes and has introduced us to new ways of delivering parts of our service, which we otherwise would not have known about. They have provided us excellent and ongoing support, and, over the longer term, will enable us to save time while adding value to what we do, and delivering a better service for both our internal and external colleagues, as well as, ultimately, the students. We now have ideas about doing most of what we do differently next time, and also has provided us the platform to enable us to explore and trial new systems and processes.

The Sustainable Futures team has given us the support and encouragement, as well as the tools and forum to enable us to improve our processes and streamline our systems. They have gone the extra mile to explore new processes on our behalf, and their enthusiasm and support has been invaluable.

Having been in two workshops very close together, the format could do with a little refresh perhaps. There are only so many post it notes a person can handle in a day!

Clarify in advance where any recommendations (e.g. from PEEPs working group) are taken so that decisions can be made in a more timely manner (this is a personal learning point as well).

It was helpful to have input from team in scoping problem approach and managing the process.

More discussion with key stakeholders to establish common ground and an intent to change.

Thank you.

1. I think that starting a major university project with an RIE was a good idea as it got everyone together to share ideas. However, there then needed to be a separate phase of negotiation post RIE to decide on the scope and nature of the project as we started the project with a very varied set of expectations and it took some time to manage this.

It was overall a good experience to work with SF and the support provided was of a very high standard.

2. Staffing resource for the project should have been agreed in advance, particularly for the project manager and the workstream leaders.

SF always had time to listen to concerns and were able to provide practical support and guidance.

3. Roles and responsibilities of project board members should have been agreed in advance.

Table 7: External Impacts

- SHEIN (Scottish Higher Education Forum)
 - Team members have been active participants in this network, which offers support to improvement practitioners in Scottish Universities and reports to Universities Scotland's Efficiency Task Force
- Conferences
 - Coventry, 10 September 2013
 - Presented a case study review of 5 years of Sustainable Futures activity
 - York, March 2014
 - Presented the Examinations Process redesign case study
 - 2nd International Lean Six Sigma for HE, Arnhem, 2 & 3 June, 2014
 - Co-presented on lessons learned about Strategic Deployment, reflection on experiences in Lean at The University of St Andrews
 - LMJ Annual Conference, June 2014
 - Presented on the importance of lessons learned in lean-type implementations
- Lean HE Hub
 - Elected to Chair this group in September 2014
 - Led two board meetings and seminars, which included using the experience of this network to support the design of our Continuous Improvement Partners programme
 - Planned for annual conference 2014 to be held early Semester 1 2014-15
- Publications
 - The team had publications in the sector newspaper the **Times Higher**¹, the industry journal the **Lean Management Journal**², and the journal for HE management **Leadership and Governance in Higher Education**³.

¹ <http://www.timeshighereducation.co.uk/comment/opinion/our-benchmark-for-best-practice-ourselves/2012697.article>

² <http://www.leanmj.com/2014/02/a-lean-course-in-higher-education/>

³ http://www.lg-handbook.info/index.php?option=com_docman&task=doc_details&qid=218