Lincoln University uses JISC infoNet's Project Management Approach and Training within a project to implement a new Information System

Lincoln University has recently undertaken a System Implementation Project using JISC infoNet's Project Management approach. John Burke of JISC infoNet asked members of staff involved in the Project at Lincoln for feedback on the experience….

The Project replaces the University of Lincoln's ageing student records and curriculum systems. Current systems constrain the University's business processes, are difficult to use and are increasingly expensive to support; they have become extremely fragile over many years of in-house maintenance. The impetus for the project comes from many quarters, including system users, support staff, managers, academics, students, core executive and even as a formal recommendation of a recent external audit. As a result, the Project enjoys wide support, but has extremely mixed objectives.

The Project is organised as follows:

- The Project Sponsor is the Pro-Vice Chancellor (Resources), who also chairs the Project Executive.
- In addition to the Project Sponsor, the Project Executive consists of the Academic Registrar, Head of Quality, Director of Learning and Information Services, Head of Business Systems and a supplier representative.
- A separate Steering Group, consisting of representatives of the main stakeholder groups, including marketing, timetabling, accommodation services, admissions, academic registry, planning,

Lincoln University traces its heritage back to 1861 when the Hull School of Art opened. A new university campus opened in Lincoln by HM the Queen in 1996 was transferred to the University of Humberside which then changed its name to the University of Lincolnshire and Humberside. In 2001 the corporate headquarters was moved from Hull to Lincoln and the university became the University of Lincoln.

The university has over 10,000 campus-based students and over 1,100 staff.

student services, faculty registrars, academics etc., has been established. The Steering Group adds legitimacy to the implementation, as well as aiding communication and ensuring that unforeseen issues are addressed.

- The Project Manager and his deputy are drawn from the Business Systems staff.

- The project team consists of operational users, supported by Business Systems staff and supplemented by supplier consultants.

Scope

The new system is at the heart of the University's business and there are few business areas that will be unaffected by its implementation. It is crucial, therefore, that the system is properly embedded within University processes and culture. The implementation is part of, and driven by, a wider programme of work that encompasses a range of business-led initiatives and associated process reviews.

The core system covers student records and curriculum data. In addition to fairly standard support for curriculum management, recruiting and admissions, assessment, progression, fees and charges, etc., the system will provide customer relationship management functionality and better integration with other corporate systems, including the University's portal.

The implementation will replace existing core functionality first (curriculum, admissions, enrolment, fees and charges etc.) and then build on this foundation to provide added value.

Timescale

The main system procurement exercise was run as a separate project in 2003 and involved a formal OJEC tender process.

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The initiation phase of the project began in November 2003 and completed in March 2004.

The remaining implementation is phased to coincide with the academic cycle, with each phase timed to support the outcome of process reviews. Each phase has its own set of natural milestones, with hardware and third-party software procurement, installation and initial training leading into data migration, testing and acceptance. The high-level implementation plans cover the next 18 months, with next 2 – 3 months planned in detail.

JISC infoNet InfoKits and Training

Previous University projects had been run within a very loose PRINCE 2 framework. The University had recently gone through a major restructuring, with merged divisions and a high proportion of new staff. As a result, project management practice varied wildly and with mixed results.

Nevertheless, many of the principles of PRINCE 2 had proved valuable, but the full weight of the methodology was found to be overly bureaucratic, with unjustified cost and time overheads. Ironically project post implementation reviews suggested that the methodology suited neither fairly straightforward technical projects, nor very complex, people-orientated projects where culture change was a major factor. Business Systems, therefore, began to look for an alternative approach.

To our dismay, most, if not all, of the commercial training on offer was geared around standard project management methods, like PRINCE, and offered little extra. JISC infoNet's website seemed to offer something different, with a pared-down project management methodology, geared towards people rather than paperwork and templates to avoid reinventing the wheel. JISC infoKit templates proved to be invaluable in quickly putting

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together our project initiation document and initial plans; to our surprise, the 'infoNet' pedigree gave the documentation a kind of legitimacy that meant that they were received much more readily (almost without question) than in the past.

Flushed with this initial success, we requested a JISC infoNet project management workshop for project managers and technical staff. The resulting day was extremely valuable on all levels. It provided a useful introduction to project management for those new to the discipline, whilst providing a timely reminder for more seasoned staff. The benefits to the project were immediate in that the sessions provided common ground and fostered consistency of approach. The JISC infoNet approach has given us a common project management language, which has made planning, monitoring and controlling the project much easier.

However, we needed to make project management less mysterious and its techniques more transparent to wider range of stakeholders. In other words, we needed to extend the 'common language'. JISC infoNet ran a second workshop for a wide range of project stakeholders, many of whom were new to project management. The sessions were extremely well received and have provided a good deal of clarity and mutual understanding within the project.

The Project

One of the early benefits of running the second infoNet workshop was that larger numbers of stakeholders contributed to the project plan, which was made available to all staff via the University's portal. This will help ensure that plans remain seated in reality and that resources are coordinated with the full range of University activities such that the impact of the project on day-to-day operations is minimised. Similar benefits have been realised in

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formulating acceptance tests and in identifying and mitigating risks and issues, all of which are communicated via the portal and newsletters, as well as through formal reports and meetings.

Conclusions

The sensible use of the JISC infoNet project management methodology has placed our project on a very sound footing. The project is focussed on clear objectives and coordinated with other University initiatives, giving the best possible chance of success as it moves into implementation proper. More importantly, communication with stakeholders is much improved on previous projects. Previous projects, based on a more heavy-weight, bureaucratic approach, have not always started so successfully - often the only objective has been to meet an arbitrary (and usually very tight) deadline, because the project initiation phase had not set objectives, articulated risks and issues nor identified dependencies. The JISC infoNet approach has helped avoid these pitfalls, whist improving communication at all levels.

JISC infoNet materials and workshops have been instrumental in establishing the project; both are well supported by the infoNet web site and are geared towards sector needs and cultures. These materials have provided common understanding and, therefore, clarity. Consequently, we will continue to use infoNet materials throughout the project and would recommend them to others involved in project management.

"Past projects showed that we needed to raise our game in the project management stakes but many of the mainstream methodologies have a large overhead."

"The JISC InfoNet method puts people, not paper, at its heart and gave us an approach that everyone could understand, without weeks of training.

Initial impressions are that our project initialisation was much tighter. It even drew praise from 2 external audits!"

Mike Day, Head of Business Systems University of Lincoln