Case study 10

Building a programme roadmap: managing the management to focus on educational leadership

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Abstract

This case study describes the process of building a programme roadmap to enable a shared understanding and sense of ownership with the various tasks involved in the management of a suite of undergraduate programmes. Collaboration with the institutional business improvement unit facilitated the adoption of a problem solving approach to building the roadmap. The roadmap now works as a 'living' document and breaks down the Programme Leadership role to share, and make visible and accountable the various responsibilities with those involved.

Introduction

This case study explores how we worked as a cross-institutional team to produce a Programme Roadmap for a suite of five undergraduate programmes. The Roadmap is a document designed to distil the activities of the programme leader (PL) and programme team to increase visibility of the tasks, create a shared sense of responsibility and increase collaboration within the group. The production of the Roadmap evolved iteratively over several phases which, although 'messier' than presented here, ensured that input to the document was shared and feedback acted upon.

Setting the roadmap in motion

Based in Edinburgh Napier University (ENU), a modern university in Scotland, I (Eva) lead a suite of five undergraduate programmes accredited by the Royal Society of Biology. We have around 500 students enrolled across the suite at any one time and a portfolio of 37 modules.

Before embarking upon this project, I had completed one academic year as PL which had quickly enlightened me on the complexities of the role. Throughout this first year I had adopted a hands-on approach, I was accessible and available to both students and the programme team. However, this

approach meant I felt responsible for all the various intricacies of the programme and as a result I felt overwhelmed. When I reflected on that year, and looked ahead, the thoughts of doing it again, in the same way, did not energise me. I felt there had to be a more efficient, effective way to go about the role, but at that time I could not see it. This is where colleagues from the ENU Business Improvement service came in. The role of this service is to enhance how people, processes and systems work together across the University.

Steve leads Business Improvement at ENU. He has a background in applying lean management and extensive experience in coaching and facilitation around such processes. Lean management consists of improvement approaches rooted in both continuous improvement and respect for people. This approach originates from the Toyota Production System and how it has been translated into other organisations (Netland & Powell 2016). Indeed, Lean approaches are increasingly being seen in Higher Education (Yorkstone, 2019).

Steve's team in ENU hosts a community of practice for people interested in applying continuous improvement within the Higher Education setting. For this community, there is a seminar series with invited external speakers. Importantly for me, it was in one of these seminars where I met Vincent Wiegel, an academic, engineer and expert in applying lean in Higher Education. Vincent spoke of how he had transformed the marking process for his programme. This sharing of effective practice ultimately sparked the idea of Steve, me, and colleagues, working to develop a heuristic model for assigning marking on a challenging research project module. The initial connection, and ensuing project, were a gateway to my appreciation of more practical, applied and iterative approaches to problem solving. It also meant I had someone to discuss the programme leadership role with and seek support for developing a solution to the amorphous nature of the position.

Constructing the roadmap

Although, as PL, resources were available to me, for example, I had a role descriptor and a PL's checklist (Edinburgh Napier University DLTE, 2021), I still required more. I needed to create clarity around the tasks that were to be completed and focus on what was required and when: this is what became the Programme Roadmap. However, it was an exceptionally busy time, so I needed to secure support for the project. There was a discussion that the project might place a burden on an already busy workload but I passionately believed that the investment up front would pay back later. The project received the support needed and so we began. With Steve's help we started the job of making the programme tasks explicit, without critical judgement, so we could see the nature of the

problem and make iterative, practical improvements towards working through how to manage these tasks.

Together, we brainstormed, listed all the tasks and all the roles or teams involved with the delivery of the programme suite. Importantly, we did this quickly without overthinking it. We realised we needed more input to ensure the list was representative of others' views. For example, Adam Satur, our programme administrator, brought a different and valuable perspective to the discussions, understanding how the administrative tasks and teams intersect over the entire year.

The spreadsheet provided a matrix structure, which allowed us to identify levels of contribution for each task. In so doing, we followed an established project management approach and used a RACI (Responsible, Accountable, Consulted, Informed) matrix (Project Management Institute, 2013) but found the addition of two further elements particularly helpful within the programme management context. First, we added an 'Uninvolved' category, second, a 'Participating' category, this enabled us to add more granularity and for one person to be responsible but allow other team members to participate in completion (Table CS 10.1).

[table CS 10.1 here]

Table CS 10.1: Adapted RACI definitions, (see also, Project Management Institute, 2013)

The spreadsheet was further developed to add details of when tasks should be completed. Also, an option to record when they were actually completed was added to enable us to monitor how work progressed in reality against the original plan. Tasks were also grouped together too to enable a simpler view. Sort and filter functions could be used to pull up related tasks or look at tasks for individual roles.

This, now highly evolved version of the matrix, was shared at our Board of Studies (a bi-annual review meeting involving programme stakeholders such as the programme team, students, and support services) and a follow-up drop-in session to enable us to obtain feedback from the programme team. We received valuable feedback in relation to the complexity of the matrix and how it could be difficult to engage with. We responded to this feedback by adding guidance on how best to use the tool; clarification on what the tool was intended for (to assist the programme team in understanding what tasks are to be done by whom when); and the tool's limitations. The feedback

served as a useful reminder on the inherent complexity of the role but also enabled us to make this complexity visible to the other programme stakeholders. These refinements gave us the final version of our Programme Roadmap.

Outcomes

At the time of writing, we have been using the Roadmap for 5 months. It is a resource to which I can turn to to inform meeting agendas and as an aide memoire regarding who is participating in tasks. I feel less overwhelmed, there are fewer surprises and I am continually reminded I work as part of a dedicated team. I no longer need to remember everything and that frees up my headspace for more creativity and innovation within the programme leadership role. Of course, we still need to refine and adapt our Programme Roadmap, indeed, I see it is a live document that will improve the more we use it and will be invaluable particularly when the time comes for succession planning.
This creative process has shifted the emphasis away from me and my perceived limitations onto a much more solutions-focused approach. As a PL, both the process and output of building the Roadmap have helped me to 'manage the management' so I can now shift my attention onto educational leadership. You may have someone in your institution that can help you do this too should you want to. Reach out to find them.

Case study references

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