



University management of work-based learning

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Introduction

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Ever since the publication of the Leitch report in December 2006, a group of pro-vice-chancellors (PVCs) from across the higher education sector have been meeting on a quarterly basis to consider the implications of the employer engagement agenda for their institutions. I have been responsible for convening the group on behalf of the Higher Education Academy (the Academy). We recognised at an early stage that the scaling up of flexible activity to meet the specific needs of people who see themselves primarily as employees, and only secondarily, in support of their work, as learners in higher education, was going to present challenges to management systems and processes, as well as to practice, and that more strategic approaches were going to need to be found.

Pro-vice-chancellors are the key to such innovation at institutional level, and in the beginning the Academy anticipated perhaps some 20 might sign up for a special interest group, probably primarily from those post-92 institutions who had taken earlier interest in activities such as work-based learning (WBL). We were surprised and delighted to find ourselves within the first three months with more than 80 PVCs signed up from a much wider range of institutions. Attendance at meetings has varied in terms of membership and volume, but a hard core of about 20 committed early in 2009 to write up their experiences, from a variety of management perspectives, on how they have tackled a range of challenges over the intervening three years. These contributions have now been brought together to assist other managers in HE who may be seeking similar solutions. They are not offered as simply transferable, but as ideas that may be dipped into and adapted to fit other contexts.

The external and policy context¹

Higher education is facing a number of significant challenges simultaneously, some of which are complementary and some of which are contradictory. For example, the Leitch report of 2006 highlighted the need for vastly improved skills at intermediate and higher levels if the UK were to remain competitive globally, and set ambitious targets for development by 2020. Leitch pointed out that almost 75% of the adult workforce of 2020 have already left compulsory education and many are already in employment, giving educational providers a responsibility to address their professional development needs by flexible means. The forecast demographic change, with a likely downturn across the UK of more than 16% over a decade in the number of 18-year-olds available to seek full-time higher education, was a considerable driver for HEIs to take seriously the prospect of recruiting different kinds of learners.

The agenda for HE to support the economy was not a new one. HEIs could show many examples of good and long-term practice in preparing learners in initial undergraduate education for employability in the professions. Collaboration between HE and business was an underlying theme in the Dearing Report of 1997, and became more explicit in subsequent Government reports. The Lambert Review (2003) focused on research, consultancy and knowledge transfer, and concluded that, although there was much good collaborative work underway, a greater stimulus from Government was needed to encourage HEIs to collaborate in identifying their areas of competitive strength in research, and to encourage business to exploit innovative ideas developed in HEIs. This led to HEFCE initiatives such as the Higher Education Reach-out to Business and the Community (HEROBC) and the Higher Education Innovation Fund (HEIF), which helped to establish infrastructure within HEIs for relating more directly to business and for diversifying the range of services and provision offered to them. Yet in spite of this intervention, HEIs in 2006 occupied a very small space, less than 3%, in the CPD market.

The Innovation Survey conducted for the CBI (MORI, 2005) found that nearly three-quarters of firms did not believe that academics understood business needs and just 53% agreed that universities were a good source of training for business – indicating significant room for improvement, probably in delivery as well as perception.

¹ I am grateful in particular to Margaret Noble and Mary Carswell for parts of this section, adapted from introductory text removed from their chapters to be incorporated into a more general context.

Just after Leitch came the Sainsbury Review (Sainsbury, 2007), which reinforced the Lambert message and emphasised the importance of science and innovation in ensuring that the UK remains competitive in an increasingly globalised economy. This was influential in doubling the number of Knowledge Transfer Partnerships (KTPs) and in turning impact upon the economy into a much more influential measure for the funding of HE research, which has generated a much greater interest among Russell group universities in the employer engagement agenda. Sainsbury had imagined a clearer distinction between research-intensive universities and those that were business-facing – a distinction which now appears oversimplistic and inappropriate.

HEIs have been encouraged to further develop their business-facing activity and the Higher Education Funding Council for England (HEFCE) has made employer engagement a key policy element in the transformation of the HE sector (see www.hefce.ac.uk/econsoc/employer). To date they have funded over 60 employer engagement pilot projects through Strategic Development funding, totalling over £148 million, and have invested £28 million in over 78 proposals to the Economic Challenge Investment Fund. The latter aims to support universities in working with over 50,000 people and 11,000 businesses in the period April 2009 to September 2010.

The current economic crisis has reinforced the importance of international competitiveness and its dependence on continuous innovation through the development and application of knowledge and ideas. The increasing recognition of the potential contribution of higher education to improving business performance and hence competitiveness, either by enhancing the attainment of current and future employees or by the application of knowledge gained through research, would appear to have been a key driver for this change. A number of reports in recent years have been particularly influential in raising awareness of this important aspect of higher education activity and have formed the basis for much UK Government policy.

Reports published by the CBI, with their business perspective, have been particularly influential (e.g. *Stepping Higher: workforce development through employer-higher education partnership* (CBI, 2008), *Emerging stronger: the value of education and skills in turbulent times* (CBI, 2009a) and *Stronger together: businesses and universities in turbulent times* (CBI, 2009b)). The CBI higher education task force (CBI, 2009b) has recently suggested how business and universities can best work together and how the sector should be funded.

A series of position papers and policy documents has emphasised the case for universities to work more closely with employers (Universities UK, 2006; King, 2007; DIUS, 2008; the Higher Education Academy 2008a, 2008b). Many others, including

regional agencies, Sector Skills Councils, the Learning and Skills Council, HEFCE, fdf, professional bodies and business organisations, have all made a clear commitment to this closer working and the positive impact that they believe this will bring.

Simultaneously, however, the near collapse of financial and banking systems across the globe has caused probably the most severe cuts to the higher education budget ever experienced. What began with a freeze on additional numbers, from which at least co-funded and much employer-related provision was exempt, has now become a real terms cut in budgets, which is likely to have a severe impact across the board, despite the aspirations the Government express in *Higher Ambitions* (2009). This report not only keeps employer engagement on the agenda in a chapter of its own, but suffuses it through all other chapters by emphasising more than ever before the economic impact of HE through teaching, research, curriculum and civic engagement. It proposes a wholesale reorientation of the curriculum towards those subjects seen to be most relevant to the economy, and in particular STEM disciplines.

The issues and challenges

Three years ago, when the stage was set by the newly published Leitch report for HE to undertake a more serious engagement with employers to provide higher-level skills for their future and existing workforces, I undertook for the Academy a swift assessment and analysis, with 16 PVCs and managers of workforce development provision in six HEIs with a reputation for good practice in this area, into what the issues were seen to be for this kind of work becoming more central within HEIs. The HEIs were geographically distributed, one in the South, three across the East, Central and West Midlands, and two in the North (all from England because the work was funded by HEFCE), and they represented a spread of type. The key issues to emerge were as follows.

Business case

What motivates HEIs to be involved in making such provision? Most expressed a serious commitment to the regional economy and skills agenda, recognising the Government interest expressed in White Papers aimed at schools, colleges and universities over the last decade, and anticipating the impact of the Leitch Review of Skills (2006). Others had reservations about being constrained by a regional identity.

However, several also saw or had taken opportunities in supporting large employers to develop their workforce on a national basis.

The UK's future as a knowledge economy was seen as necessitating engagement by employers with HE, which in turn would only thrive in an advanced economy; so there was a virtuous circle.

The demographic decline of 18-year-olds over the next decade was also focusing attention on possible alternative markets and income streams. One scheme, which had grown from 0 to 800 learners per annum over five years, was reckoned by its leader to have recruited 80% of its participants from those who would otherwise not be engaging with HE. It had also attracted £2 million of non-HEFCE income for development over that period.

For institutions that were relaxed about recruitment, workforce provision offered an opportunity for expansion through the award of additional student numbers. Some institutions were forecasting growth in these markets of 50-100% over the coming year, and growth was felt to be constrained more by the resource that institutions could invest in it, rather than by the actual size of the market. Where individual subject areas were threatened by recruitment trends, workforce provision helped keep them healthy, and diversification helped manage the risk.

Lifelong learners had the potential to become loyal customers, bringing repeat business of their own and from fellow employees. The further potential for these learners to be re-engaged as employees/employers feeding back into both curriculum and pedagogy was a grossly underused resource to support staff and other students. KTPs were an exceptional example of where a three-way benefit to learner, employer and HEI was deliberately exploited. Workforce development activity was also capable of attracting research contracts, and was certainly seen as a form of applied research by practitioner/learners who were refining the knowledge base of their fields.

There was much to celebrate in the performance of work-based learners, which was felt to be often superior to that of on-campus learners. However, there was a lack of collated evidence about this success.

The impact of work-based learning systems upon institutions had often been much greater than the relative size of schemes would suggest in stimulating innovations such as modularisation, credit, flexible delivery, APEL, etc.

Strategic or opportunistic?

There were different degrees of engagement by senior management with workforce development provision, and of visibility and priority within mission statements and corporate plans and strategies, which had a knock-on effect in terms of spread across the institution. Sometimes even the distinct portfolios of PVCs/DVCs created silo-thinking about employer engagement.

There is an interesting question about what 'strategic' means in the context of the institution. For example, some universities were able to show a clear integration of employer engagement (under various names) at the highest level of documented strategy, but may have less control over how this was interpreted and prioritised at the level of implementation. Staff at implementation level sometimes appeared less aware of institutional strategy than managers might hope. In most institutions workforce development activity had a hard time competing for priority with more mainstream teaching and research.

Some institutions were able to describe very strategic approaches to one or more particular aspects of employer engagement, e.g. institution-wide approaches to undergraduate student placement or foundation degrees, without these necessarily being integrated one with another.

However, most universities were coy in claiming that employer workforce development was, as yet, both holistically and strategically driven in such a way that might appear joined up to employers. Even where cross-institutional mechanisms, like matrix teams or committees, operated, the main driver was what worked for the institution rather than for the employer.

Links could be made to other flexible and e-learning approaches, but they were on the whole not fully integrated with work-based learning. There is an interesting related question as to how much of the curriculum for work-based learning may lend itself to pre-specified content as opposed to negotiation.

There was a view that it would be helpful if national agencies and stakeholders could offer a more strategic and joined-up vision of what was required.

The chapters below from The Open University, the University of Derby and Middlesex University show how some have moved on in mapping out institution-wide strategy.

Scale

The scale of provision remained hazy, and varied a lot, depending on what was included. Full-time provision commissioned by the NHS and TDA constituted very significant parts of institutional income. Foundation degrees constituted a small but growing part of HE, but were often carried out through partnerships rather than directly, and were considered to have required more effort than they have yet repaid. Data for part-time UG and PG work-related provision are collected by HEFCE and HESA, but were not at the time distinguished by work-relatedness. Institutions frequently did not quantify their work placements except where these were one-year sandwich components. The HEBCIS survey collected data on third leg activity, but this often took no account of accredited workplace provision. Better collation of all these data was needed to provide a more accurate estimate of supply in relation to demand. There was a general sense that we had underestimated the value of this work.

Bespoke provision remained marginal in most institutions. This was not related to latent demand and the potential size of the market, since Smith and Nixon had estimated that HEIs had only 0.5% of the CPD market, which was well in excess of £4 billion per annum. At the levels of operation at that time, institutions had not found much need to market, because they were restrained in growth more by internal systems than by interest expressed by employers.

Workforce development was felt to present challenges to every operational aspect of an HEI, many of which are outlined below. It may be summed up in the words of one PVC, HEIs “are likely to stay within their comfort zone unless the writing is on the wall”.

Cost

Workforce development provision had to be cost effective, including overheads. There was a general view that the HEFCE T funding methodology did not adequately recognise the real costs of work-based learning and supporting partnerships.

Premium funding might be helpful, although the very notion of premium suggests a deviation from the norm and ducks the issue of real costing. Activities at the heart of employer responsiveness, e.g. short courses, closed courses, bite-size provision, APEL and accreditation, were then unfunded by HEFCE. This has subsequently eased, but the concept of co-funding was introduced into the EE pilots funded by HEFCE and has proved to be only partly successful, attracting average contributions from employers of some 30%.

There was certainly a cost in developing the capacity and competence of staff to undertake the work, as well as the opportunity cost of preliminary discussions with employers, which did not always result in provision. There was a lack of development funding to meet the opportunity cost of getting into the market in a significant way, and third leg funding had never fully realised the intention of being a realistic third strand, competing with research and teaching funds for serious attention. Sometimes HEROBC/HEIF had been dedicated exclusively to full-cost commercial activity, rather than benefiting accredited workforce development.

There was a view that while employers expressed demands, they were often unwilling to 'put their money where their mouth is', and even transferred costs from their own previous graduate training schemes to HEIs.

Few universities were significantly investing in workforce development activity as yet, or even reinvesting the income it generated, which sometimes got lost in cross-subsidising less profitable activity. Much work was subsidised by short-term funding, which often rendered it unsustainable.

Some managers felt the expense of work-based provision was exaggerated, since learners did not make such a call upon university facilities as full-time undergraduates.

There was also an interest in how collaboration between providers in innovative ways might make for economies for all. For example, could there be a free sharing of e-learning material to avoid reinventing the wheel by every institution?

However, it was generally felt that there was much work to be done in calculating the real costs of such provision, and that universities needed to become more sophisticated in calculating reasonable fees to charge. The Academy has subsequently carried out a small-scale study of the comparative costs of campus-based and work-based learning, which is available online (www.heacademy.ac.uk/assets/York/documents/costing_work_based_learning.pdf).

Management location

There was a debate about where to locate the management of workforce development. Three of the institutions interviewed had created a central academic unit to help roll out work-based provision across the institution, and the other three had CETLs with a similar remit. This approach offered benefits in terms of coherence, standardisation of processes, standards of responsiveness to employers and client management. It also recognised the prevalence of generic aspects and

cross-disciplinarity in work-based studies. One institution was maintaining a central database of employer contacts for placement purposes, but more general customer relationship management (CRM) systems appeared to be still at the stage of being discussed, rather than fully implemented.

Central management, however, also involved complex relationships with other academic units in aspects such as ownership of the curriculum, sharing funding and buying in staff expertise. Some institutions preferred to maintain operations at faculty/school level because of their stronger links with sectors and because university systems worked more smoothly at that level.

The chapter by the University of Bradford explores these options in more detail.

Quality and standards

HEIs were understandably concerned for their reputation, which is frequently reflected to the public through performance indicators based upon traditional provision and inherently conservative league tables. Innovative provision that challenges these measures risks being misinterpreted as a 'dumbing down' of HE and will be unattractive to the risk averse.

QAA maintains that there is much mythology about their processes inhibiting development in flexible provision, and indeed they have produced useful guidance about e-learning and placement practice; they have subsequently revised *Section 9: Work-based and placement learning of the Code of practice*, and are currently examining *Section 2: Collaborative provision and flexible and distributed learning (including e-learning)*. However, the institutional processes developed to meet the Code of practice do tend to be dominated by assumptions arising from provision for on-campus learners, studying sustained qualifications, for which the expertise resides in academic staff. In February 2010, QAA released new guidelines to support employer responsive provision.

Workforce development prompts awkward questions about, for example, legitimate sites of knowledge, who determines the content and process of learning and assessment, where does expertise reside, what is the relationship to subjects/disciplines, and who is fit to examine and moderate? Controlling assessment in the variable context of the workplace, with variable support and supervision, was of particular concern.

Some universities would not accredit the provision of employers or accept credit transfer from other institutions, but insisted on complete control of curriculum

design. However, development and validation processes were long and seen by employers as unresponsive. Quality assurance appeared to have little to do with customer satisfaction.

There was a need to examine roles and responsibilities and to become more fleet of foot. As one WBL manager put it: “Rigidity doesn’t equal rigour.”

In 2010 the Academy will publish resources produced by nine demonstrator projects that have tackled the issues of maintaining quality and standards in work-based learning provision.

Academic buy-in

If QAA are right about the ‘mythology’, then they may be being used by some academics as a shield for more endemic resistance. There continues to be considerable opposition to the Government’s view of the function of HE as reflected in the skills agenda. Many disciplines simply do not match well with specific occupations or workplaces. There are more powerful drivers like research and student demand that shape workloads. History has made staff cautious about what can appear to be the latest fad that will not prove sustainable. Provision in which academics do not feel expert is threatening and often uncomfortable, and even more familiar techniques like those for managing placement opportunities do not necessarily transfer well to supporting learning in the workplace. For departments where recruitment is buoyant, there is a degree of inertia in engaging with provision that can be harder to manage and with potentially lower margins. Some full-cost activity competes with private practice by staff, which has different levels of control within different institutions or even different disciplines.

Yet where staff were well engaged, it tended to be in communities of practice from which great satisfaction was derived. One WBL manager described the work as “such fun, with such rewarding students”, as well as yielding much scope for pedagogic research and publications. Such staff have recognised what Smith and Nixon record, that workplace learning is “essentially a form of research where established knowledge combines with new information gained from reflection and analysis of workplace practice to generate new knowledge”.

The chapter from Birmingham City University shows some innovative ways to engage staff in the business agenda, and several chapters outline rewards and recognition systems introduced to encourage participation.

Workforce and business planning

Winning academic hearts and minds is one challenge, but there were more pragmatic barriers to engagement when workforce planning was based upon timetabled hours in classrooms on standard-sized modules and programmes. Too frequently the activities underpinning workforce development provision were undertaken 'on top of the day job', and so remained marginalised and limited in scope. This could include the opportunity cost of preparing distance and e-learning materials and systems, as well as the support of learners.

Project funding and pools of associate staff do not always bring the quality of staff needed to undertake activity to appropriate standards.

There was a need for more flexible workforce managerial tools and proper recognition of related activity in workloads. Some managers had a preference for using the same staff in both traditional and innovative delivery, but others were prepared to employ a dedicated workforce if necessary and justifiable by scale.

Business planning, committing HEFCE core funding up front to workforce development markets, was underdeveloped where response times meant cohorts might be unpredicted at the formal start of the academic year.

Staff competence

It could not be assumed that if capacity were resolved, competence would be automatic, since mirroring on-campus provision is rarely appropriate for workforce development needs. Many institutions had already invested significantly in staff development for workforce development, but it remained challenging to have sufficient competence and capacity to develop innovative curricula and pedagogies, and to conduct a dialogue with employers that both sides understood. There was a strong view that a dedicated team was needed who could undertake the last of these in such a way as to build sustainable partnerships.

For academics to choose to prioritise such development and activity would require reward systems and career opportunities to be aligned to them as well as they are to research and teaching activity.

Administrative systems and facilities

It was not only planning tools that were not fit for purpose in accommodating workforce development provision, most institutional systems were challenged:

- fixed entry and exit points may not be responsive enough;
- standard curriculum package sizes may not fit many programmes;
- admissions requirements may not accommodate ‘experience’;
- enrolment systems may not be appropriate for learners who never attend on-campus;
- fee rules may not recognise the contribution of the workplace;
- it is not always possible to predict at the start the level at which a learner negotiating their programme is going to work, yet registration expects this;
- timetabling may have difficulty in coping with blocked activity or events happening at unconventional times, e.g. weekends;
- facilities may not support part-time and flexible learners regarding opening hours, access to resources and to support. Some HEIs felt the need for state-of-the-art facilities to be taken seriously by industry, and had not fully explored how the facilities of the companies themselves might be used.

National systems are often as intractable as institutional systems. Recognising progression only at year-ends and completion only on student qualifications may render some learners invisible and unfundable. Funding requires credit, and the attraction of credit demands assessment, yet the learner and even the employer do not necessarily need it. Moreover, non-credit-bearing provision reduced the load upon academic staff too.

Neither HEFCE’s data collection systems nor HESA accommodated the right information on workforce development, so few universities had incorporated into their own systems appropriate categories of information, which may be costly to change.

The chapter by the Universities of Greenwich and East London addresses many systems issues and illustrates some innovative approaches.

Marketing

Marketing systems and spend were a good case in point, where they tended to be loaded towards the young, full-time, on-campus markets, and did little to explain or persuade employers what HE had to offer them. Moreover, key employer stakeholders other than

NHS were rarely treated with the conscientious nurturing by senior managers that might be afforded to supply-chain schools, colleges and in particular overseas institutions. For example, there were few examples of celebrating productive relationships with business in dedicated awards ceremonies for major employer stakeholders.

The workforce market is clearly a more difficult one to communicate with, because of its diversity, and there are no real equivalents for part-time adult learners in the workplace of bodies like UCAS, Connexions or Aimhigher.

Even when a market was generated, its life might not be as guaranteed as the more traditional markets, so it may require more overhead to constantly regenerate it.

The chapter by the University of York demonstrates the effectiveness for HEIs of working together to address this agenda. The Training Gateway has been powerful enough to speak to companies internationally as well as in the UK.

Employer buy-in

The experience of most institutions was that, despite Government exhortation, it remained difficult to obtain genuine employer engagement. Much of it was piecemeal and depended upon the connectedness of individual staff, which made it unsustainable when they left.

There was a view that employers protest about employability, but when challenged to make a real input to the HE curriculum regarding design, delivery and particularly co-funding, they were less willing. SMEs are always cited as harder to engage, but some viewed large employers as equally difficult in that they often preferred to undertake staff development in-house. Moreover, in some regions there were considerably fewer large employers to engage. However, on the whole, institutions were finding it more economical to engage with larger employers for both volume and sustainability of contracts. Public sector and even voluntary sector employers were considerably easier to engage than those in the private sector.

When employers were engaged, there was often a significant cultural barrier between business and HE, with neither understanding one another's language, drivers or modus operandi. It takes time to get a real dialogue going, showing each other mutual respect and generating trust and partnership.

The chapter by Leeds Metropolitan University shows how it and other HEIs found ways to engage employers in curriculum, assessment, placement and other activities out of an enlightened self-interest.

National initiatives

While institutions recognised the importance of this agenda to Government and national agencies, they felt overwhelmed by initiatives. These initiatives have huge opportunity costs in preparing competitive bids and proposals, in terms of set-up times, bureaucratic reporting and endeavouring to attain sustainability. Moreover, recent initiatives like Lifelong Learning Networks, Higher Level Skills Pathfinders and employer engagement pilots, appeared to overlap and were creating political tensions at local levels. There was a reasonably widespread view that there could be better ways to use the available resource to build upon existing and more mainstream networks, institutions and departments that were willing to commit to this activity in a longer-term and more serious way. The kind of cultural change that workforce development activity involved was not felt to be susceptible to short-term or marginal activity.

Where are we now?

The above, then, was the reported situation in November 2006, and it was against this backcloth that the PVCs began to meet and address the issues as best they could, often supported by funds to experiment. What follows in eight chapters is an account of how some of those HEIs have moved onwards, addressing the challenges along the way.

The endeavours to become more strategic and to turn an entire institution around to become more business-facing are charted in the two chapters from The Open University (OU) and from the University of Derby. Alan Tait describes how the OU assessed its aims, the market, its capacity to deliver and its USP. He explores how they matched offer to actual needs, and how they devised their operating model, taking into account their strengths and weaknesses, so as to arrive at a win-win position.

The University of Derby, like the Middlesex University example that follows later, shows that it takes some time to turn a whole institution towards a business-responsive agenda, and that this often progresses through a number of distinct phases. In this case, a strong central body for communication with clients was created, with easy access to senior management, so it could readily call upon all parts of the organisation to address needs, especially through a number of Workforce Development Fellows appointed to lead cultural change, curriculum and pedagogical development in each of the faculties. The product was high quality and full cost, to ensure it is highly valued.

The whole question of whether to adopt centralised or distributed structures to manage employer engagement has become a key one, and the University of Bradford has investigated widely what the various benefits and issues are in achieving responsiveness to employer needs. Like Derby, they have found benefits in new hybrid central roles, but they have equally identified ways to incentivise participation widely across schools or faculties.

The University of Middlesex shows that it is not just structures that need to be challenged, but systems, processes, regulations and in effect all infrastructure. Their four phases of development illustrate the subtle differences that location within an institution can make to development and delivery.

The University of Greenwich illustrates how all university systems are challenged by the needs of part-time learners, particularly those studying at a distance. This chapter suggests how to review all systems in a strategic way, outlining potential criteria and some of the key issues. With a particular focus upon academic systems, it shows how some have been remade in the interests of flexible learning, both within the Greenwich context and that of the University of East London, and how they have endeavoured to bring staff along with them.

Birmingham City University has tackled the key issue of hearts, minds and skills of staff to undertake what is often a very different style of activity. They demonstrate three different approaches that have worked well in various ways: the creation and support of Innovation Mentors, the provision of specific training for project appraisal and evaluation, and support to work in depth with employers on curriculum redesign.

The University of York demonstrates the advantages that have been gained by HEIs working together to promote the benefits they can offer to employers in The Training Gateway. This chapter also illustrates various approaches to marketing taken by a number of universities to forefront the business agenda, including the use of students to address business problems, working with intermediaries and sectoral networking.

Leeds Metropolitan University has explored a variety of ways for encouraging employers to engage with HE, including curriculum design, delivery and assessment, and work-based learning. They advise creativity in building upon links with alumni, or using links with employers for one purpose to generate new business with them in another dimension.

Not all the challenges have been equally addressed here, and some have been addressed in other places. Not all the victories have been won, and much is still unfolding and indeed changing with the context. However, we hope that this volume will chart progress along the way, and perhaps support others who are facing similar dilemmas.

I. Making The Open University a significant partner of choice for employers

Alan Tait, The Open University

Introduction

This chapter seeks to offer an insight into the process of creating a strategy for the development of employer engagement in a unique higher education institution, The Open University. While the chapter will be based within The Open University's experience of planning to engage with employers, it will seek to analyse the strategy formulation process in order to offer insight for the sector.

In the last 20 years or more, there has been an increased need to take a strategic approach in this and other public sector organisations, as environments have become unstable, and competition has been explicitly and purposefully introduced within the sector and externally from the private sector. Strategy formulation and its linkage to operational delivery have therefore a central place in the sector, and this chapter seeks to contribute to improving our effectiveness in that sphere.

Background

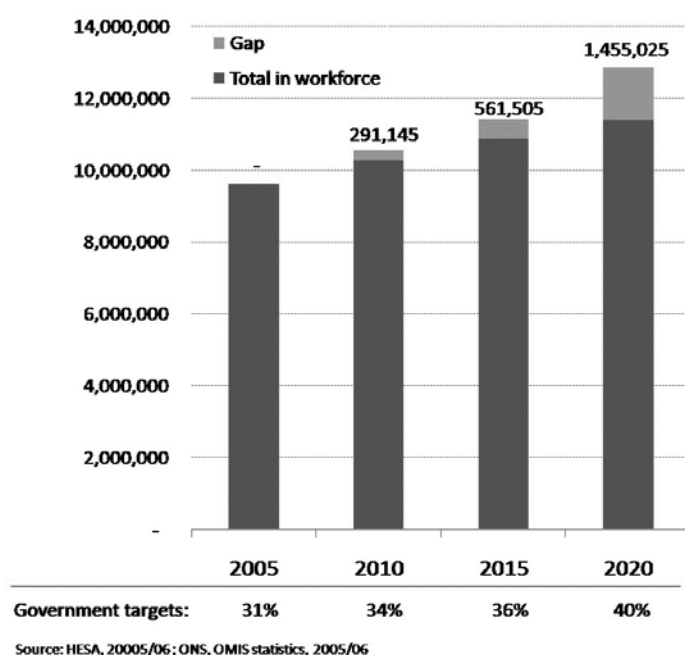
The core issues that the Employer Engagement Strategy was intended to engage with were:

1. Increased demand from UK employers for workforce learning and development and better relationships with higher education institutions;
2. The Government's target of 40% or more of the working age population to be qualified to level 4 or above by 2020;

- The need for diversified income streams to The Open University to reduce the dependence on HEFCE in particular and on the other HE funding councils in the UK (The Open University is unique in being funded by all of them).

The opportunity in employer engagement is significant. An additional 1.4 million people already in the UK workforce will need to attain level 4 skills by 2020. This is equivalent to training an additional 97,000 people per year for 15 years (see Figure I.1).

Figure I.1: NVQ4+ in the workforce



The Open University, as the UK’s leading distance learning provider with its core and longstanding experience of teaching adult part-time learners at home and in the workplace, is in a unique position to reach those who are already considering studying at university level, as well as those who could be encouraged to do so by the greater availability of home or work-based study opportunities. Around three-quarters of OU students are in full-time work.

Employer engagement has always been an important element of The Open University's educational provision and has embraced a wide range of activities: including professional training and development, knowledge transfer, research and innovation, and community action.

Initially, the University's core teaching activities were focused on the individual learner and our teaching methods and infrastructure were set up to meet their needs. Employers engaged with The Open University through their support of learners in the workplace (e.g. by paying fees, allowing time off to study, linking promotion to academic progression).

More recently, The Open University has developed professional and vocational programmes linked more closely to the needs of industry and business, including a wide range of management modules and qualifications, 20 foundation degrees in subjects ranging from Health and Social Care to Computing and its Practice, professional programmes in Education, Nursing and Social Work, and doctoral training linked to the provision of studentships in and through the professional workplace. These are being offered with models of collaborative teaching, involving employers in student support and assessment, and innovative methods of accreditation. In 2007–08 over 30,000 students completed modules that were part of professional or vocationally focused programmes in Health, Social Care, Education, Law, Maths, Computing, Science and Technology.

However, it was agreed by The Open University's senior management team that what was needed was a strategy for acceleration and expansion. In October 2007, the Vice-Chancellor's Executive allocated strategic investment funding to a University-wide skills and employer engagement development project to run over two years.

Strategy formulation process

The key questions that faced the OU were:

- What did The Open University want to achieve in the field of employer engagement that was different from where the University was already?
- What capacities and capabilities did The Open University have that matched employer needs and what would it need?
- How could The Open University differentiate itself from other public and private workforce learning and development providers, i.e. what would an analysis of the competitive environment demonstrate?
- What objectives and targets should The Open University set for employer engagement in the next three years?

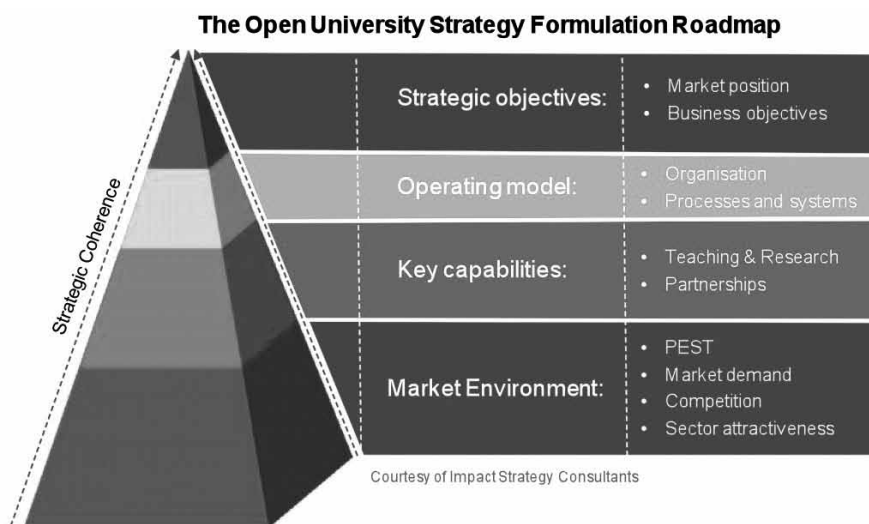
In terms of adapting or creating curriculum for employer needs, we had some substantial experience, in particular in our Faculties of Health and Social Care, and Mathematics, Computing and Technology, and in a small unit for Continuing Professional Development.

Through discussion in the senior management team, the University agreed that it wanted to develop a more ambitious vision and contribute to a greater extent to the UK skills agenda. It was also agreed that employer engagement would be a significant element in our ability to reduce The Open University's dependence on funding council income, and that we would be able to make use of our particular capacities to work in flexible ways, supported by technologies for learning and teaching. To do so, however, we needed to make a step change in the ways in which The Open University engages with employers and in the ways in which it designs, delivers and supports workforce development.

Over a five-month period, The Open University thoroughly explored market opportunities and employer requirements through interviews with more than 1,000 UK employers, and assessed the strategic fit with The Open University's capabilities.

To develop the Employer Engagement Strategy, we used a four-staged strategy formulation roadmap (see Figure 1.2).

Figure 1.2: The Open University strategy formulation roadmap



Step I: Market environment

Understanding what employers want

In the first stage, we analysed our overall environment. Working with available data, we concluded that, based on income streams from consulting, applied research, knowledge transfer and education and skills development, The Open University was already the third largest UK higher education institution for overall income derived from employers. We also noted, however, that there was a group of seven universities who were moving fast up the rankings. This gave us both confidence that we had a significant profile, but also the warning that unless we continued to develop, we would be pushed down the field and find it more difficult to expand our business with employers.

In the light of a number of visits to other higher education institutions, we also concluded that there were some approaches to employer engagement, in fact the most widespread and familiar approaches, with which we were not in a good position to compete. These were those where a regional university managed through close and regular contact a series of client relationships in their geographical region.

Our interviews with UK employers identified a number of factors as critical to the genesis of successful, sustainable employer partnerships. These provided an agenda for change as we transform our capacity and capability to work more effectively with employers:

- a. outward focus: commitment to building clear understanding of and fit with employer needs;
- b. relationship management: creation of a clear point of contact backed by strong relationship management processes, skills and systems;
- c. mutual value: identification of the value of products and services to employers;
- d. flexibility: willingness to adjust processes and products where that is necessary to create mutual value;
- e. integrated and flexible product: recognition that The Open University's 'product' is a combination of courses, service, awards, expertise and other elements and that the extent to which any combination of these can be configured and integrated to match a given partner's needs is a design challenge for both parties;
- f. seamless service: ability to share information and manage processes across organisational boundaries;

- g. communication and information sharing: ability to share information, knowledge and experience across internal teams and units;
- h. management visibility and control: clear visibility of costs, risks and other factors, with the ability to make effective trade-offs where necessary.

There were some clear advantages for The Open University in meeting the success factors, in particular the core commitment to part-time, distributed and technology-supported learning. There were also some challenges. First among these was the fact that OU modules have derived their high quality from thorough and time-consuming preparation. While The Open University has made significant progress in fast production of learning materials over the last decade, the capacity to respond at greater speed, which was understood to be a core need in responding to employers, would present problems. Secondly, the OU business model predominantly requires a significant scale of student numbers in order to be able to amortise the cost of modules over a period of six to eight years. This would make it difficult to create learning materials for a small number of learners for an employer on a local basis at a price that employers would be prepared to pay. Lastly, The Open University's reputation is rightly very high in terms of quality of service to students, as our top rankings in the National Student Survey regularly demonstrate. However, our service for employers, which is essentially a business-to-business service, has not been developed in our own assessment to a similar quality, and indeed we knew from employers that they have found it sometimes confusing and laborious to work with us. We knew internally that we found it difficult to join up services that employers wanted, for example from sales/solution/contract through to delivery.

Identifying the core employment sectors

Like most universities, The Open University is organised on a faculty basis. When working with employers, however, we recognised that we needed to organise ourselves in relation to employment sectors and to build teams that align with sectors rather than faculties.

We had the clear understanding that we would have to select, prioritise and focus, as otherwise we would be lost in the huge field of employment sectors, and confused in what we were trying to do. We needed to identify sectors that would be most responsive to our particular capacities and capabilities, and provide us with both income and learning.

In order to do this, we assessed 41 employment sectors, using a variety of sources against:

- the proportion of the workforce that was at English Qualification Framework levels 3 and 4, and therefore well placed to take that element of the workforce on to higher levels of study;
- the extent of the employment sector spending on workforce learning and development and the potential future spend;
- the openness of the sectors to blended and e-learning;
- future management employment requirement and skills shortages;
- research and knowledge transfer investment;
- presence of professional bodies and Sector Skills Council agreements as potential routes to market; and
- level of competition from other HEIs.

We also assessed our own capabilities and capacities against each employment sector, taking into account:

- presence in the employment sector through students and research;
- the number of courses that were relevant to the employment sector; and
- the number of employer relationships in the last three years, and the extent to which we had relationships with relevant professional bodies and Sector Skills Councils.

This led us through sustained examination to identify four priority sectors, with which we intended to engage.

Step 2: Key capabilities: understanding our strengths and weaknesses in employer engagement

In developing our vocational and professional provision, The Open University is able to build on some key capabilities.

- Supported open learning on The Open University model can be delivered directly to individuals for study at home or in the workplace at times convenient to them and to the business. It is therefore not as disruptive as other forms of learning and development.

- Open University teaching can also be delivered wherever the learner or the employer chooses. The quality and consistency of The Open University's materials and support will be the same wherever employees are based. This consistency of offer is particularly valued by large, distributed organisations.
- The Open University's open access policy and broad curriculum means that learners are able to start at the level they choose and to proceed as far as they wish in a wide variety of subjects. Moreover, its credit rating and credit transfer services mean that people's existing skills and achievements can be recognised; its validation services mean that employers' own provision can be academically recognised.
- Open University teaching is also renowned for its quality and fitness for purpose. Employers tell us that we deliver effective, interactive learning experiences that offer practical and relevant business benefits. Employees are able to apply their learning in the workplace immediately and to contextualise their learning within their working environment and role. Employers are able to select, adapt and version courses and services that meet their specific needs for staff development and the business.

Nevertheless, we know that we have a number of areas that need development in our employer engagement model. A study of The Open University's capabilities in corporate relationship management found five issues requiring attention:

- prioritisation between competing partnership opportunities is often lacking;
- account ownership is weak because management is distributed across several units with different goals and priorities;
- internal communication and co-ordination is difficult because the interface between product development, sales and service is 'fuzzy';
- internal processes and systems are poorly matched to employer demands; for example, there is no single point of contact with a clear and simple process for accessing the University's products and services;
- internal processes and systems are poorly matched to service delivery demands; the University has been very successful in developing provision to meet employers' needs, but in some cases faculties are struggling to make time to systematise operations.

As we move forward, we intend to build on our strengths while addressing our areas of development.

Creating new workforce learning and development products and services

In the last three years, The Open University has taught sponsored UK students on more than 600 courses. However, 44 courses (or 7%) account for 50% of all the sponsored students. Obviously, the current Open University product and service portfolio does not fully meet the needs of UK employers.

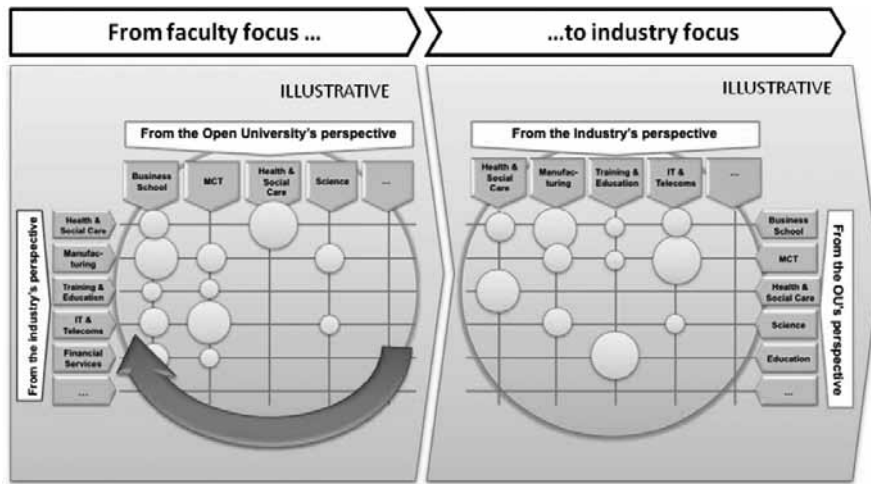
To develop new workforce learning and development products and services, we needed to actively involve the University's academic staff since it is they who need to work with employers jointly to design and deliver learning programmes, and it is they who best understand the sectors and how to generate improvements to business performance.

In order to develop and test new products and services of employer engagement, The Open University therefore created a team of academics drawn from the Faculties of Health and Social Care, Maths, Computing and Technology and the Business School, as well as the Centre for Professional Learning and Development (CPLD), to work with colleagues in Marketing and Student Services. The team engages directly with selected employers in designated industry sectors to explore their business improvement needs, discuss appropriate solutions, develop tailored provision using a range of Open University learning assets and, where appropriate, employers' own materials, and devise appropriate delivery vehicles (whether conventional open learning or wholly online).

Step 3: Employer Operating Model

We moved at this point to assess how we could improve the employer journey. There were a number of core elements that we had to bring together with a view to understanding what actually took place in the 'as is' world, in order to design the 'to be'. The OU had a small Corporate Employer Services sales team who worked intensively with a number of major clients and with a number of the faculties. Some of the faculties themselves had a range of significant employer relationships. However, the major proposition to employers was on a faculty basis, in other words based on structures that make sense within the organisation but not necessarily to an employer looking for solutions to particular issues. The major task was to move the focus from a faculty-by-faculty approach to individual employers to a whole-university face to a sector and the employers within it, as in the figure below.

Figure 1.3: From faculty focus to industry focus



Further than that The Open University had established in 2007 a new unit from parts that were already present to create a Centre for Professional Learning and Development (CPLD). The Centre was tasked with two areas of work: firstly to create a suite of short non-accredited learning modules, of some 30 hours' duration, working both from existing course materials and ab initio. Secondly, their task was to work with employers in a bespoke way to contribute to their learning and development needs. The CPLD draws on faculties for academic contributions to the creation of content, with financial rewards flowing back to faculties at unit level (but not to individuals apart from the usual performance reward process). The CPLD thus had within its operating model the core methodologies needed for engaging with employers.

The Employer Operating Model teams worked through the Summer of 2008 taking two leading sectors as models. The range of stakeholders across The Open University worked together to map out how relationships worked at present, and how they should optimally work in the future. We also examined the employer engagement operating models in 13 other universities.

We made the strategic choice that we would not separate off employer engagement in a different part of The Open University. An element in our overall goal was to open up the University to more external engagement, and we would not achieve this if employer engagement was seen to be done 'elsewhere'. The Employer Engagement team being assembled was designated as leading the activity

and prospecting for business, but not as 'doing employer engagement'. That task was essentially being managed by the faculties, or at least almost all of them who were involved, the CPLD, together with the Corporate Employer Services sales team.

Step 4: Strategic objectives

Out of this work, we then set our strategic aim for The Open University, and in support of a bid to HEFCE for Strategic Development Fund support.

Our assessment of the market and of our own capacities and capabilities led us to believe we could make a transformational change in the business we could do with employers. From a base of 16,500 sponsored students in 2006–07, we set ourselves the target of doubling the number of sponsored students by 2012 and to become the largest higher skills workforce development partner among higher education institutions.

We also believed we could recruit and support 500 FTE co-funded places, and indeed agreeing to fulfil this element of Government and HEFCE goals was a crucial element in the proposal to HEFCE.

In terms of our overall curriculum offer we proposed that:

- we would be able to attract employers to the existing programme to a greater extent, recruiting more sponsored students to the suite of some 20 foundation degrees; with our substantial programmes in Nursing, Health and Social Care, and Social Work; and in more sector-specific training such as the CISCO programme;
- we would develop more employer-specific programmes, and build the already existing ability we had in the CPLD;
- we would develop ways to accredit workplace learning at both undergraduate and postgraduate levels.

Strategy execution

The execution of our Employer Engagement Strategy during 2009 has concentrated on a number of concrete steps:

- we have developed and piloted courses to accredit workplace learning;
- we have, through the use of Interim Sector Heads, refined our sector-specific strategies;
- we have appointed a Director for Change, to build the business-to-business

- capacity for employer engagement across The Open University;
- we have appointed two Sector Heads to take up posts in September 2009; and
- we have piloted a customer relationship management system for employers more widely in The Open University.

We are at the same time in the eye of the storm regarding the economic climate, with what is widely regarded as the worst financial crisis since 1945. Evidence from a range of sources about spending on learning and development is conflicting. Some sources indicate that budgets for training managers are indeed being cut. Others indicate that this is limited. The UK Commission for Skills and Employment (UKCES) has led a campaign to highlight the fact that those organisations who continue to train during the recession are likely to come out of it earlier and more successfully. Some of the evidence about the impact of the recession highlights the concern of training managers to continue to spend on conventional modes of training: away from the workplace, and using residential accommodation or hotels. The Open University offer avoids those elements of cost, delivering learning in the workplace and at home, without the need for the employee to leave the workplace. Thus it is our intention to capitalise on the strengths of our offer at this difficult time.

In reviewing the strategy formulation process, we have learned firstly that we needed to supplement the expertise within the University in particular regarding commercial understanding of environmental analysis and business process. Equally we have appointed colleagues with substantial private sector as well as public sector experience to head up the Sector Teams. However, there is no doubt that while The Open University is not a business in the simple sense of needing to create profit for shareholders, the need to develop commercial understanding for our educational purposes demanded access to new expertise. Changes in the public sector over the last 20 years revealed that there are a substantial number of skilled professionals 'out there' with experience in both. Secondly, a change process demands substantial communication with colleagues across the University, and considerable effort has gone into workshops and staff development events in order to deliver change and to learn and capitalise from those colleagues who have substantial experience in this field. Lastly, the change process has taken longer than we planned. Impediments have included difficulties in finding the right people to take this forward and difficulty in creating space for a new area of activity. We now have to achieve what the strategy sets out!

The Open University is pleased to acknowledge the contribution of Impact Strategy Consultants Ltd (www.impact-strategy.com) and Way 10 Ltd in the development of the University's strategy for employer engagement.

2. The University of Derby and University of Derby Corporate: Developing a business-facing institution

Dawn Whitemore and David Young,
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The origins of University of Derby Corporate (UDC)

Employer engagement is a key strategic objective for the University of Derby (UoD). This area has been part of the UoD portfolio for the last ten years, helping to position the University as a significant player in this field of academic practice.

Historically, UoD had a strength in having been a provider of education primarily for the teaching and health professions. In 1998, it determined to capitalise on its vocational roots by appointing a PVC Client Services whose role included building relationships within the region and giving UoD a business responsive orientation. The appointment coincided with the HEFCE offer of HEROBC, and subsequently HEIF funds, for which UoD succeeded in obtaining the highest amount on offer. This enabled the creation of a small central infrastructure known as Regional Enterprise Development (RED), which began to broaden the brief of a small consultancy and business services company, known as DUEL, into the more mainstream areas of taught programmes, culminating in the validation of the UoD Lifelong Learning Scheme in December 2000. Designed to facilitate the University in supporting and assessing negotiated learning – particularly negotiated work-based learning – the Scheme achieved early success in the field, became a lead partner for the UFI Learning Through Work provision, and won the 2006 Times Higher Award for Most Imaginative Use of Distance Learning.

UoD had another advantage from 1998 of a merger with an FE college, and good relations with other FE partners, so it could make a seamless offer to employers of provision at all levels. Unsurprisingly, it embraced the provision of foundation degrees from their inception, both directly and through its FE partners.

From the beginning, it was intended to keep all faculties fully engaged, and RED co-ordinators were appointed in each one. However, they were not always at a level to influence priorities, and had little career progression. Moreover, faculty and central systems created something of a drag on responsiveness.

In 2004, it was determined to make a senior appointment of a Director of Business Development, with a wide brief to sharpen the entire market analysis for the University, including its responsiveness to business. The appointee would be a full member of the Corporate Management Group, and able to support Executive members with wider responsibilities.

UDC – the next logical step

In 2007, UoD, as part of its response to an increasingly complex market, sought funding from HEFCE's Strategic Development Funding (SDF) for employer engagement. This ambitious workforce development programme seeks to develop a new relationship between higher education (HE) and employers. UoD had recognised for some time that traditional HE models needed to be adapted in response to changing demographics and a predicted rise in the volume of higher-level skills needed by UK companies to be internationally competitive. The challenging targets for growth in level 4 achievement proposed in the Leitch Report (2006) required a step change in the volume of HE/business collaboration on workforce skills development. With such clearly identified policy drivers, it was an inevitable and logical next step for UoD to designate this area as mission critical, with all that this implies in terms of the proactive engagement of the most senior managers in driving the agenda forward.

The Leitch Report has not been received as an uncontested 'good thing'. For example, the focus on skills using a concept of delivery, rather than the development of learning relationships does not address the fact that higher education is a transformative process, concerned with analysis, contextualisation, evaluation and critique. University-level learning is not easily commodified, parcelled up and distributed to fill gaps in a deficit model of learning. Nevertheless its value has come not from unquestioning acceptance of all its recommendations, but from its function as a catalyst for change with the debates that followed its publication. With a long-standing track record of success in delivering flexible vocational skills development, UoD felt itself well placed to respond. The aim has been and remains to build on institutional strengths and be a lead HEI in testing responses to the HE/employer engagement challenge for higher-level workforce development.

Commercial thinking – developing stakeholder value

Building on the existing strengths that have been developed and nurtured in the area of work-based learning has enabled a strong business and academic model to be devised and implemented. This model brings together many key ingredients to ensure a robust, sustainable, academic, commercial, employer-facing operation that delivers impact solutions. The launch of UDC moves UoD into the next phase of workforce development, providing a demand-led commercial operation.

The UDC proposition

The role of UDC is to expand the UoD's market share for higher-level learning by reaching, through their employing organisations, potential learners who would not traditionally pursue university-level learning. We are also very interested in capturing activity within organisations that is at a higher level but not recognised as such. We know that higher-level learning does not just take place on university campuses. At UDC we make the workplace a laboratory, a lecture theatre and a classroom as required. If knowledge and skills learned in the workplace keep businesses and organisations going, then the new knowledge and skills developed there enable businesses and organisations to grow.

The whole operation puts the employer as the customer at the heart of all thinking, systems and processes. UDC only services business-to-business activity and all solutions developed are work-based. The UDC offer does not compete with core university business. It is clearly differentiated in its offer of learning opportunities designed to generate work-related knowledge and for learners to apply this knowledge in workplace contexts.

Derby City Council Regeneration and Community Department serves 650,000 people. The organisation faced a challenge in equipping managers to respond to change and manage this change within the workplace.

UDC helped them respond to this challenge by enhancing the organisation's Management Development Programme and locating it within the higher education framework. To achieve this, we employed our complementary expertise so that DCC

staff are better equipped to manage and drive change in line with the development needs of the organisation and delegates earn UoD credits for their company-based learning.

While every UDC learning solution is bespoke, this does not mean that every development is 'new every time'. Rather, we have a portfolio of distinctive tools to enable us to develop a variety of customised and cost-efficient learning solutions for business. These tools – analytical, developmental, technical and evaluative – are deployed as required in partnership with the client to address learning challenges of the organisation and ultimately to improve the bottom-line performance of the business.

Smiths of Derby are clockmakers who have been based in Derby for 150 years. Their challenge now is to penetrate new markets. Working with UDC they have researched their operations, developed flexible courses for senior managers and rolled out a company development programme focused on work-based projects. These projects brought tangible benefits – the factory environment improved, financial awareness increased and there was an improved understanding of company strategy.

The institutional position of UDC

UDC is a highly visible initiative, which, essentially, runs as a devolved structure, functioning within the parameters of mainstream University procedures. It was recognised by the UoD Executive that, to ensure the employer engagement agenda was fully supported within the organisation, UDC needed to have a sphere of influence that enabled developments and changes to occur in a responsive corporate manner. Direct access through a number of high-level groups to both the Executive and senior management team has proven invaluable to the development of UDC. This has enabled constructive commercial and academic debates to occur, producing informed decisions, owned by the institution as a whole, which have subsequently been fully implemented.

UDC systems

Academic quality system

The principles of the UDC academic quality assurance approach are that it is risk-based, and that from this analysis of risk proportionate, fit-for-purpose validation and approval procedures will enable and support a timely response to meeting client need.

Costing, pricing and finance systems

Diversification of income streams for universities is one of the key drivers behind employer engagement. The investment that businesses make into training and skills development is significant at an estimated £39 billion a year (Learning and Skills Council, 2007). The task for HEIs generally is to apply strategies for increasing their share of this investment. The approach undertaken by UDC has been to position the UDC proposition as a premier product, applying a fully commercial approach to the marketplace. This therefore demands a full understanding of all the costs of operating a business and all costs associated with each solution developed.

The price is derived and influenced not merely by the cost base, but from a number of relational factors such as market expectations and norms, the competitive environment and the strategic fit of the business solution. It is imperative for the long-term development of workforce development and learning that the impact created and the benefits achieved to the client's bottom line have a transparent return on investment, so that premier pricing for a premier product reflects value for money. We feel that, as well as being responsive to market demand, we also have a market-making task to achieve. We need to educate businesses to become aware that, while investment into bespoke accredited work-based provision may appear expensive, the actual benefits to the company are significant and measurable.

The finance systems for UDC operate within the central systems of the University, but they have been modified to enable a commercial service to be provided. All customer communication is managed by the UDC team. This includes invoicing, debt collecting and queries. The approach has proven to be highly successful, ensuring that UDC as a business is located within the overall finances of the University, but that the actual customer face of the UDC business operation is owned by UDC.

Management information system

Effective customer support and service is critical in developing a sustainable competitive advantage, particularly in business-to-business situations. Customer intimacy is a recognised strategic stance (Treacy and Wiersema, 1995). With rapid knowledge creation, increasing expectations regarding responsiveness by customers and an increase in technological capabilities, getting closer to the customer could be argued to be easier. However, achieving and sustaining the high standards of service, demands constant investment in both systems and people.

Developing the commercial infrastructure required a realistic approach. Using the main University systems would ensure continued investment, but they had to be made fit for purpose. The management of information had to be good, reliable, timely and accurate, enabling us to provide a first-class service. Significant work was undertaken to ascertain the fit between commercial demand and current systems and, through this, it was evident that the systems were flexible and capable of satisfying our requirements. More importantly, the organisation was keen to make this work, and the word 'no' has not been used, just 'how?'

The systems development has been highly complex, since each facet of operation has a network of relationships. Our first challenge was being able accurately to identify the information needed, its source, purpose and value-chain impact. Once this had been outlined, the next challenge was to identify the systems required both from a technical perspective and, just as importantly, from the human perspective.

It has become evident from our findings that implementing a devolved system while operating within the parameters of the University's mainstream procedures was a sound strategy to undertake. Some of the key components of system development in UDC's start-up period have been:

- a customer relationship management tool;
- a customer and delegate portal;
- the capture of delegate information relating to enrolment, assessment, retention and achievement;
- a learning repository containing reusable curriculum resources.

The UDC approach to the work-based curriculum

The central idea of our work-based programmes is to focus attention on learning through the actual activities of work (Eraut, 2004). They require learners to engage purposefully with the professional (and social) contexts in which learning takes place (Billett, 2002, 2006) and they support learners in doing this, essentially through skilled and responsive tutorial engagement alongside a range of electronic tools and resources (Bosley and Young, 2006; Young and Stephenson, 2007). A key principle is to enable the high-level learning that occurs in many workplaces to be planned and made explicit so that outcomes can be tested against criteria for certification (Evans, 2004).

The idea is to work with clients in partnership to develop learning opportunities that can generate work-related knowledge in the context of application. Theoretically, UDC's curriculum thinking is broadly located in notions of situated learning and learning as an active social process (Lave and Wenger, 1991). The concept is for professionally situated individuals to explore the familiar contexts of their work environments and to generate meaning, new knowledge and learning through participation in communities of practice. Learning opportunities are not contrived for study purposes but arise from normal work, so that the two are complementary with learning tasks influenced by the nature of work and, in turn, work being influenced by the learning that has occurred.

Our approach enables learners to match professional learning to the requirements of an academic award, representing the same levels of rigour and intellectual challenge as those acquired in more traditional ways. This is achieved through clearly demonstrating that UDC programmes are located within the Quality Assurance Agency's (QAA) Framework for higher education qualifications (FHEQ). A distinctive feature of UDC is its ability to provide, for companies and organisations, bespoke programmes of professional and workplace development, tailored to organisational objectives and leading to UoD credit and awards, for groups or cohorts of learners. To summarise, our learning solutions meet the needs of learners, contribute to the longer-term development of the organisations involved and are formally accredited as university qualifications.

This recognition, that there are many legitimate sites of higher-level knowledge production, is possibly the most exciting and potentially liberating area of UDC's work and it offers true employer engagement. It is vital that employers and employees recognise that higher-level learning and knowledge production can and does occur daily within all areas of the working world. Capturing, further developing and expanding on this naturally occurring activity is where UDC really can add value.

The Workforce Development Fellow – an academic career path in work-based learning

Six Workforce Development Fellows (WDF) were appointed as UDC was established. Appointment as a WDF recognises high-level capability and professional expertise in the development of collaborative relationships with local, regional and national employers. Within the university, WDFs sit in parallel with Teaching Fellows within the existing, highly successful UoD Teaching Fellowship Scheme, which was implemented in 2004 to recognise, develop and reward excellence in teaching and learning.

Teaching Fellowships are recognised and highly sought after by UoD's academic community as a career progression route. Workforce Development Fellowships were presented in a similar manner and attracted significant interest from academics both within and outside the University. Recognising that employer engagement is a specialised and fast developing field of academic enquiry within which individuals need to make a sustained professional commitment, WDFs were appointed to full-time positions and charged with having organisational impact both within their client companies and also within the University.

Their role sits at the interface between faculty academic staff, UDC and the workplace. In particular they are engaged in developing new pedagogies and learning techniques that are suitable for workforce development and embedding these in the faculty as well as leading faculty staff development programmes for employer-led, higher-level learning and development. The work of the Fellows is underpinned by research that they undertake in this field.

As a new breed of academic – they might usefully be termed 'academic entrepreneurs' – their role is to lead the culture change in academic centres. Business facing, they bring academic skills and experience to bear on the HE/employer interface through both wide, generic abilities in work-based learning as an academic field of study and their own disciplinary perspectives.

The role of Workforce Development Fellows includes to:

- engage with and lead development of best practice in employer engagement and work-based learning pedagogy (including APEL);
- act as a champion for HE employer engagement – provide support to faculty-based academic staff and disseminate best practice across the institution and the sector;
- identify strategies for implementing a cultural shift within UoD's faculties enabling employer engagement and workforce development to become key drivers for the development of new curriculum models;

- collaborate closely with employers and employer representative bodies (e.g. SSCs and professional bodies) to improve access to and recognition of higher-level learning for the workforce;
- be highly skilled in the understanding and articulation of issues facing businesses and able to place such business issues in a HE learning and development context;
- provide professional academic guidance and support to employers and employees;
- lead the development and design of customised programmes for employers;
- locate and secure academic input from faculty staff into customised programmes for employers;
- ensure compliance with quality and standards (including attendance at assessment boards, internal moderation and external examination processes).

They are line managed by a Faculty Assistant Dean with special responsibility for Flexible and Partnership Learning. This is designed to retain the full involvement of faculties in the core academic work of UDC. Their operational work schedules are agreed within UDC structures and regular joint faculty/UDC reviews underpin both the development of the Fellow's chosen career path and the achievement of UDC's performance targets.

Conclusion

UDC opened for business on 1 August 2008. We have secured 22 contracts with employers since September 2008 and our first year of operation has been successful in terms of both business performance and the successful enrolment of over 110 FTE learners in 2008–09. We are persuaded of the importance, in developing a business-facing institution, of the following:

- the need for the development to be a transparent strategic objective with the active sponsorship of senior management;
- the need for a creative integration of commercial thinking and academic rigour to support organisational development;
- the need for a degree of 'market making' and to educate the market by providing clear narratives of success to which potential clients can relate.

We also know that, rather than seeking out cheapness, clients are happy to buy a value-for-money proposition if it gives them what they want in terms of business impact.

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3. Centralised or devolved structures for managing employer engagement

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Introduction

For many higher education institutions the employer engagement agenda presents challenges both to the prevailing culture and to the systems and processes that underpin their traditional 'core business'. These challenges relate both to the university's interface with business, and to the willingness and capacity of staff to respond to cultural, social and economic diversity in the student profile, and especially to the participation of work-based learners. This chapter explores the management issues associated with the implementation of an employer engagement agenda, as it has come to be defined, and uses a case study approach to share emerging models of centralised and devolved approaches for developing and managing employer engagement in the higher education (HE) sector.

The chapter illustrates how traditional approaches to higher learning are being challenged by the implementation of employer engagement. It highlights some of the benefits of involving all areas of an institution's activities in this agenda, and how a combination of centralised and devolved approaches can be used as a catalyst for cultural change. The chapter gives three brief portraits of HEIs that represent different aspects of managing employer engagement. The chapter concludes by drawing lessons for employer engagement structures and practices.

The issues

The traditional model of higher education, comprising full-time undergraduate courses delivered predominantly to school leavers, over a fixed three-term year, has given rise to a particular culture within many HE institutions, which is predicated on a particular academic and administrative infrastructure. It is therefore inevitable that either a shift in direction towards new types of provision, or even adding, as a marginal activity, provision that requires a radically different approach, will present significant management challenges.

The implications of employer engagement strategies at departmental and subject level also need recognition (HEFCE, 2009; Nixon *et al.* 2006) and changes therefore need to be sensitive to subject differences as well as different staff viewpoints (Tynjala *et al.*, 2003). For example, the implications of increasing student-centeredness and new kinds of courses, such as work-based learning, can enhance the relevance of HE for employers, but may challenge traditional or elite conceptions of gradueness and even of disciplines themselves (Annette, 2007).

Similarly, the demands of employers and employee learners often transcend traditional subject and organisational boundaries. Such boundaries can result from narrow departmental interests, which can be exacerbated by devolved arrangements and resource allocation models that result in internal competition rather than collaboration. According to Annette (2007), the resultant semi-autonomous practices within universities may create obstacles to new ways of working.

Effective employer engagement requires higher education institutions to respond to changing requirements, such as the flexible learning needs of mature and work-based students (McGivney, 1996). For example, the persistence of a traditional academic year still reflects cultural resistance to change, with deviations from this confined to relatively few courses in most institutions. Deep-seated, traditional approaches have tended to resist these types of structural adjustments that could facilitate, for example, more part-time or portable learning for a work-based student population. Indeed, some would argue that what is required is a dramatic cultural shift away from traditional models of teaching, knowledge production and dominant academic discourses towards teaching and support that is more appropriate and engaging for future learners (Thomas and Jones, 2003), as well as businesses (HEFCE, 2008). This implies a significant academic development component to the employer engagement change agendas within higher education institutions.

External relations can be one of the areas in greatest need of improvement (CBI, 2008; UNITE, 2007), affecting a university's ability to respond quickly and consistently and to meet customer expectations of both the relationship and the quality of provision.

Management and ownership of these change processes by senior change agents is important (Martinez, 1996). Garnett *et al.* (2008) refer to the organisational governance and management decision-making processes as the 'structural capital' of an institution, and acknowledge the potentially challenging nature of developing institutional work-based practices.

So, the culture, organisation and academic philosophy of an institution all have a bearing on its ability to engage successfully with employers, and the embedding of such initiatives has involved, sometimes, radical and cultural change, risk-taking and even a challenge to assumptions of mission and purpose (Martinez, 1996; Human Synergistics, 2003).

Methodology and data sources

The chapter draws initially upon the experience of the University of Bradford and then on two more specific aspects of employer engagement through two further case studies – the University of Chester and Teesside University. This approach allowed triangulation of data from a range of devolved and centralised employer engagement activities and practices. The research activities included:

- web review of all HEFCE-funded employer engagement projects to select three institutions based on a range of approaches to employer engagement;
- brief review of literature on HE employer engagement policy and practice issues;
- devising research questions to explore: key institutional objectives, roles and responsibilities; the nature of the institutional model of EE; and achieving culture change/'paradigm shift' in EE;
- contact with key respondents such as PVCs, Employer Engagement Project Directors, and others with relevant central/corporate university-wide roles;
- collecting data through semi-structured interviews, seminars and institutional documents.

The cases

The following three cases were chosen to illustrate some of the management issues for the sector.

University of Bradford: Escalate Employer Engagement Programme

Lessons from the case

- Trans-disciplinary approaches to complex business problems are required, and these necessitate effective and responsive cross-school working. Flexibility and responsiveness in internal collaboration is required across *all* institutional activities including quality assurance, student support, registry, finance and marketing communications.

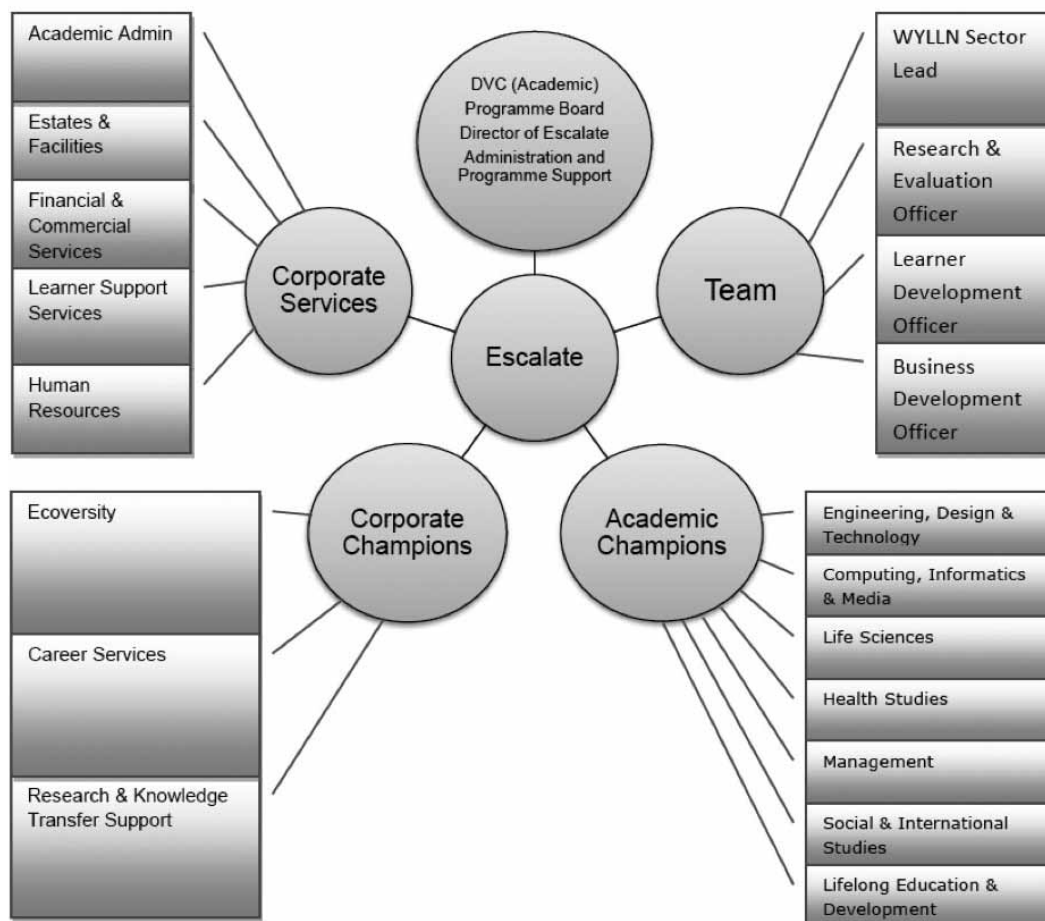
The University of Bradford is a medium-sized research-informed university with a consistent and long-standing record for students gaining successful employment outcomes after graduation. The Escalate Employer Engagement Programme, in line with the Leitch Review of Skills (2006), seeks to reposition the University as a key provider of higher-level skills training and workforce development.

While the University achieved significant growth in its full-time student number base in the two years leading up to the Escalate bid, growth was less strong in part-time recruitment. Externally, the University is seeking to play a much stronger role in the economic development of the Bradford District, establishing effective partnerships with key sub-regional employers, and encouraging employers to take more responsibility for, and to make a greater financial contribution towards, upskilling their workers.

Internally, Escalate aims to be a catalyst for change and organisational development across the University, and specifically, to shift the academic framework of the University so that it is more focused upon part-time provision, reflecting the principles of negotiations over pace, place, length, content, delivery models and learner support.

The programme is overseen by a Programme Board chaired by the Deputy Vice-Chancellor (Academic) and comprising a Dean, a 'champion', and representatives from the Knowledge Transfer department, Estates, Finance, Academic Quality and Strategic Planning. It is strategically located in the Offices of the Vice-Chancellor, as shown below.

Figure 3.1: Employer engagement organisational structure, University of Bradford



Escalate has been a major influencing force in the preparation of the next five-year Corporate Strategy and is deliberately and centrally positioned within the institutional Widening Participation Strategy. While it was recognised that there was already a considerable amount of good practice around the University, Escalate has brought a significant financial investment and sizable central team, which was seen as a way of bringing together, energising and enabling the relevant expertise, and rolling it out across the University.

The central team of six people includes roles that recognise the breadth of the challenge:

- a business development officer whose focus is the employer interface and growing new markets;
- a learner development officer whose role is to support and contribute to the emerging associated academic strategy through which will emerge new approaches to curriculum design and pedagogy for work-based learning;
- a programme support officer whose function seeks to inform the development of the University's existing systems and processes into the kind of infrastructure and support required by employers and employee learners; and
- a research and evaluation officer to gather and analyse evolving practice and to facilitate staff development and dissemination.

Fundamental to the Escalate Programme is the embedding of employer engagement across the institution and for this to work it is vital that schools and the academic staff within them buy in to the project. There is a team of employer engagement 'champions' based in each of the University's academic schools, in the career service, and in the University's 'Ecoversity' project. The funding model supports the central infrastructure but also makes a significant resource available to academic schools, both to fund champions and to support other academics in developing employer engagement activity. In return for the devolved funding, champions submit an annual activity plan that sets out the school priorities in relation to employer engagement, and are monitored on its delivery. A similar process is used to manage the additional development funding, where there is strong emphasis upon the delivery of the business plan outcomes and outputs and the achievement of co-funded student numbers.

The support of the University's senior management is demonstrated by the commitment to establish real incentives to encourage embedding across the institution, such as a 'premium' in the resource allocation model attached to co-funded student numbers. All new course proposals are scrutinised to establish whether there has been liaison with Escalate and whether the proposal fits within the employer engagement brief. Planning for co-funded student numbers has become part of the mainstream student number planning process and as such raises the profile of the exercise in the minds of Deans and others involved.

Champions underwent an intensive development programme before taking up their roles, and continue to meet on a monthly basis. A seminar series, through

which they can raise and explore emerging issues and ideas, has also begun. Escalate runs an ongoing programme of 'practice workshops' through which external contributors and partners such as those in the West Yorkshire Lifelong Learning Network can meet and share good practice with colleagues from across the University schools and departments.

These latter examples of staff development reflect the importance of educational development in achieving the changes required. Moving forward, the embedding of employer-responsive part-time provision becomes part of the new Academic Strategy, and the Escalate Programme office part of a new Academic Development Unit. This is a reflection not only of the need to shift the balance of the University's accredited 'offer', but also of the pivotal role of programmes such as Escalate in 'flexing' the academic infrastructure and curriculum to meet the changing needs and increased diversity of the entire student population, not just those in work.

University of Chester: Improving capacity and capability in employer engagement

Lessons from the case

- There is a need for a curriculum design and pedagogic approach that meets the requirements of employers and work-based learners, including curriculum models, and systems and processes that support the accreditation of prior experiential learning and accreditation of in-company training, for example.

The Chester project emerged through the local Lifelong Learning Network. The second phase, like Bradford, is led from the Offices of the Vice-Chancellor but also integrated into faculties. The business interface is managed through a team of Employer Engagement Officers, Business Translators and Employer Curriculum Development Officers. Employer Engagement Officers are based in the central directorate, work with employers to identify training needs and also work with external partners such as colleges, private training providers and Sector Skills Councils. Business Translators are recruited internally and seconded to the employer engagement directorate. They work together and with a private training provider. Employer Curriculum Development Officers work with the University to develop learning programmes that address the needs of businesses.

At Chester employer engagement issues have been identified through a strategic evaluation of widening participation activities. This suggests an emphasis upon addressing student diversity as a means of meeting employer needs and reaching

learners in work. The development of an appropriate curriculum, for example by incorporating professional standards, APEL and in-company training, and having an infrastructure to respond, such as a rapid validation process and a shared reporting system through registry, are seen as key priorities.

The involvement of local colleges and training providers adds complexity and challenge to the Chester arrangements, but at the same time provides a platform of experience of working with employers on which to build. Employer engagement is seen as '2nd Mission' and is incorporated in the University plans for the future. The University has identified key aims for the next phases, which will involve the integration of the project within the core infrastructure of the University. It aims to extend the reach of its employer engagement activities into other employment sectors, to create an employer link database, and to further development of the learning and support approaches for work-based learners.

Teesside University: A corporate customer relationship management database

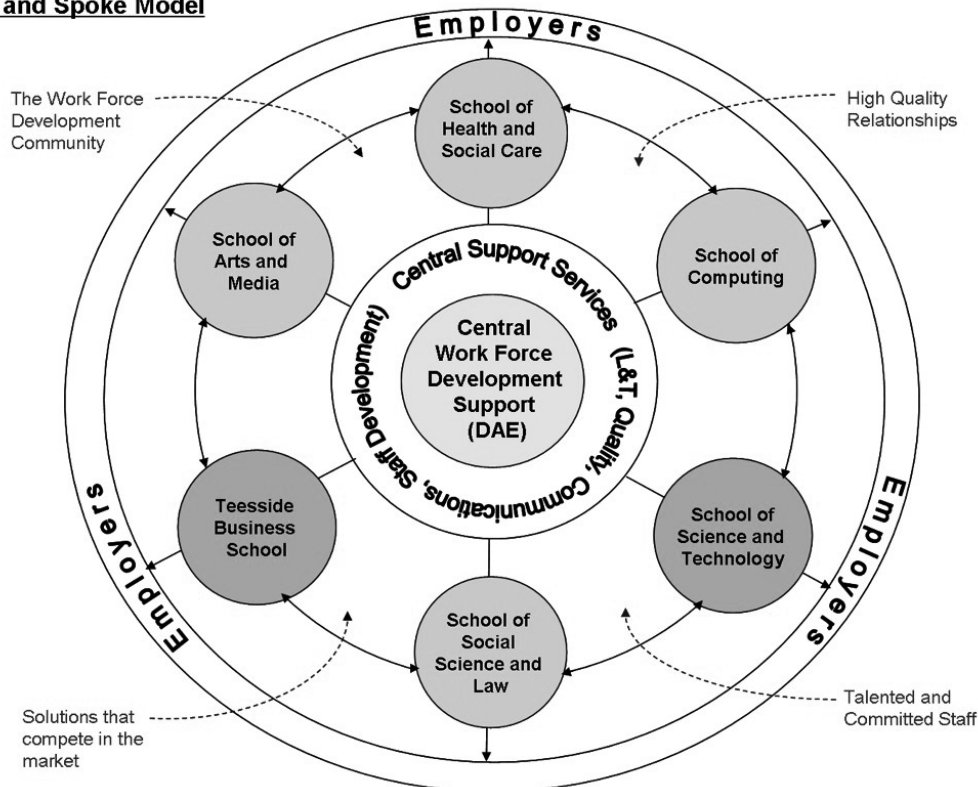
Lessons from the case

- A business interface requires staff with the skills (including 'selling skills') and the willingness and time to engage with employers. It requires communication in a common language that all parties can understand. Employers need to be able to access the University's services, and business relationships need to be effectively managed across the institution.

The diagram below reflects the 'hub and spoke' model adopted by Teesside University. A small central support team work with all schools to generate contacts, manage the ongoing relationship and develop and deliver courses to meet business needs. A central customer relationship management (CRM) system is essential to communicate between academic schools, the central support team, and across schools.

Figure 3.2: Employer engagement organisational structure, Teesside University

Hub and Spoke Model



The Teesside case illustrates the use of both centralised and devolved approaches to the introduction and management of a central CRM system for managing employer relationships. The ‘ownership’ and management of employer and business relationships, and the management of the information associated with them is a perennial issue for institutions that have embraced the employer engagement agenda. The dominant culture across the sector attracts, supports and rewards an individualised approach to career development and to everyday teaching and research. As a result, academics are often very protective of their relationships and contacts. Few universities have either the culture or the systems for managing business ‘customers’ in a way that would be expected good practice in the private sector.

Teesside University have adopted a corporate CRM database for employer engagement that is run centrally by the Academic Enterprise Department. Sponsored by the Vice-Chancellor, it is seen as a 'key operating system'. The central data management team professionalise the service and act in a cross-school quality assurance capacity, checking accuracy and consistency and ensuring that employers have only one point of contact.

The initial contact creates the record on the system and becomes the Account Manager for that employer and the owner of the information. Importantly, Business Account Managers take responsibility in each school and build on the relationships with new and existing companies through an account management process that Teesside have articulated through a Code of Practice and Business Services Charter.

The system focuses upon employer enquiries and contracts (it is not used for tracking students), and a wide range of strategic staff development training and workshop activities have been carried out to involve all staff. At the forefront of the development are the school Business Account Managers, who have taken on the role of being the first point of contact for each school's customer base. Some academics have engaged with the system; however, it is predominantly intended for use by 'business interface' staff and administrators.

Conclusions

Through dedicated programmes, the case study institutions are adopting both centralised and devolved approaches to managing employer engagement. The programmes represent a radical shift in approach by the universities and, significantly, are seeking to achieve both internal and external cultural change. External drivers associated with the particular economic, social and demographic challenges of the regions, the changing needs of the national economy, the structure and role of the public sector, technological advancement, and not least the current recession has meant that significant internal change is required in order to respond. In the case study institutions there appears to be a willingness at the highest level to look critically at any potential barriers to the embedding of employer engagement, such as quality assurance processes, costing and pricing, and cross-school working.

Traditional disciplinary boundaries, autonomy and control may be challenged by employer engagement missions and strategies (HERDA-SW, 2008). This can be seen, for example, in an increasing trend towards the sharing of employer information

through centralised CRM systems. The development of Teesside's CRM system and the associated roles and management arrangements represents a shift towards a 'business solutions approach' and reflects the new overall branding of the University. It is an ambitious move for a university, relatively unusual across the sector and would present an enormous challenge for many institutions.

Institution-wide employer engagement initiatives may also have a significant impact on the overall academic development of an institution in the longer term. The cases suggest that greater strategic work-based focus requires integrated approaches to curriculum design and student support, through academic departments as well as central support services. This is likely to benefit all students.

Moreover, the adoption of quality assurance standards, allocation of resources and effective monitoring and evaluation need to be addressed to make such integrated services feasible. Centralised quality assurance processes may need to provide moderation of practices and rigorous monitoring for consistency, but also can facilitate the development of flexible provision, responsive to new learners. All of this represents an ambitious, but promising, programme of change and one that is being addressed head-on by many institutions for which employer engagement is a key priority.

There also appears to be a strong emphasis upon whole-institution staff development with multifaceted approaches seeking to involve and reach a wide range of university staff, and also partners. At Bradford, for example, staff development approaches are increasingly integrated with wider University staff development activities such as the annual Learning, Teaching and Assessment Conference and the Distance Learning Conference. Even dispersed or marginal initiatives can potentially become embedded institution-wide, as well as sector-wide, through staff development mechanisms. Cascading approaches as well as bottom-up approaches can enable a focus on enhancing teaching quality and can achieve a better balance of devolved and centralised activities. In this sense, educational development approaches as well as managerialist-led approaches can be used effectively in employer engagement.

The three cases suggest that employer engagement can be a catalyst for cultural change across the sector and give rise to new educational development opportunities and new ways of managing the business interface. Incentivisation and staff development can be seen as key tools in stimulating workforce development activity and innovative approaches to learning. 'Business development' professionals are widely used to initiate employer relationships, whereas in some institutions where embedding is seen as important, academic staff are being encouraged to develop a more business-like approach and to concentrate their efforts on employer-facing activity. It can be

seen that importantly, both academic and support staff can be brought on board by demonstration of engagement, and evidence of success, in employer engagement activities from across the sector.

The different models of employer engagement examined have adopted a combination of centralised and academic school-based processes, and the emerging changes suggest that conclusions can be drawn for developing good practice in employer engagement across the sector. In particular, embedding and developing the capacity to respond to future opportunities can be effectively managed through both centralised and devolved structures, and by ensuring that employer engagement is a strategic priority reflected across all activities of an institution.

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4. Developing a university-wide strategic approach to work-based learning: the case of Middlesex University

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Introduction

This chapter identifies the factors affecting the strategic development and organisational structures of work-based learning (WBL) at Middlesex University. The Middlesex experience is used to shed light upon the wide-ranging demands that work-based learning makes of higher education practices and structures and suggests ways in which these might be met. In this chapter WBL is understood to be learning that is at higher education level and that primarily takes place at and through work, in order to meet not only individual development aspirations but also the objectives of a relevant organisation (usually the employer) (Boud and Solomon, 2001).

Since the early 1990s Middlesex University has pioneered the development of work-based learning at higher education level. Despite the growth and success of work-based learning in specific areas, a key question for the University has been how best to capitalise upon it as a strategic resource for the whole institution. The award of a Centre for Excellence in Teaching and Learning in work-based learning by the Higher Education Funding Council for England in 2005 stimulated the development and application of work-based learning more widely across the University (Garnett, Costley and Workman, 2009) and contributed to the establishment of the Institute for Work Based Learning as a pan-University academic unit in 2007. The creation of the Institute paved the way for a £10 million project launched in 2009 to establish the Middlesex Organisational Development Network (MODNet).

The development of WBL at Middlesex can be seen as following four distinct phases.

Phase I: Curriculum innovation

WBL at Middlesex University was underpinned by an Employment Department-funded research and development project focusing upon the identification and accreditation of the 'curriculum in the workplace'. The project ran from 1992 to 1994 and resulted in the development of techniques for identifying learning embedded within work roles (Naish, 1995). During this period the University also established a small central unit to oversee the development and operation of accreditation. In 1992 this unit developed a University module to provide a structured and quality assured mechanism for individuals wishing to claim accreditation for prior experiential (especially work-based) learning. This was a significant development as it was the first module created at Middlesex to support the work-based learning process.

The success of the accreditation services and the curriculum in the workplace project encouraged the University to establish the National Centre for Work Based Learning Partnerships (NCWBLP) in 1993. The NCWBLP was managerially and physically located within a central service unit with responsibility for access, international and marketing work and aligned to the School of Education for quality assurance and assessment. From practice-based evidence the first Director of NCWBLP advanced the proposition that work-based learning was not just a mode of study but also a field of study in its own right (Portwood, 2000). This proposition was considered at length before finally being approved by the Academic Board of Middlesex University and led to the validation of Work Based Learning Studies as a subject area within the curriculum of the University (Portwood and Garnett, 2000). The creation of work-based learning as a field of study was a paradigm shift that liberated WBL at Middlesex from the constraints of established subject discipline-based thinking, allowing it to develop rapidly through engagement with a wide variety of influences, many of them from outside the University through the establishment and growth of work-based learning partnerships (e.g. Garnett, 2007). However, this radical approach also aroused incomprehension and in some cases antagonism from some academics. While this approach has proved to be an enduring one, which others have chosen to follow (see Boud and Solomon, 2001), it still requires continued justification and explanation internally and externally (e.g. Gibbs and Garnett, 2007) and may have hindered the take up of WBL approaches across the University.

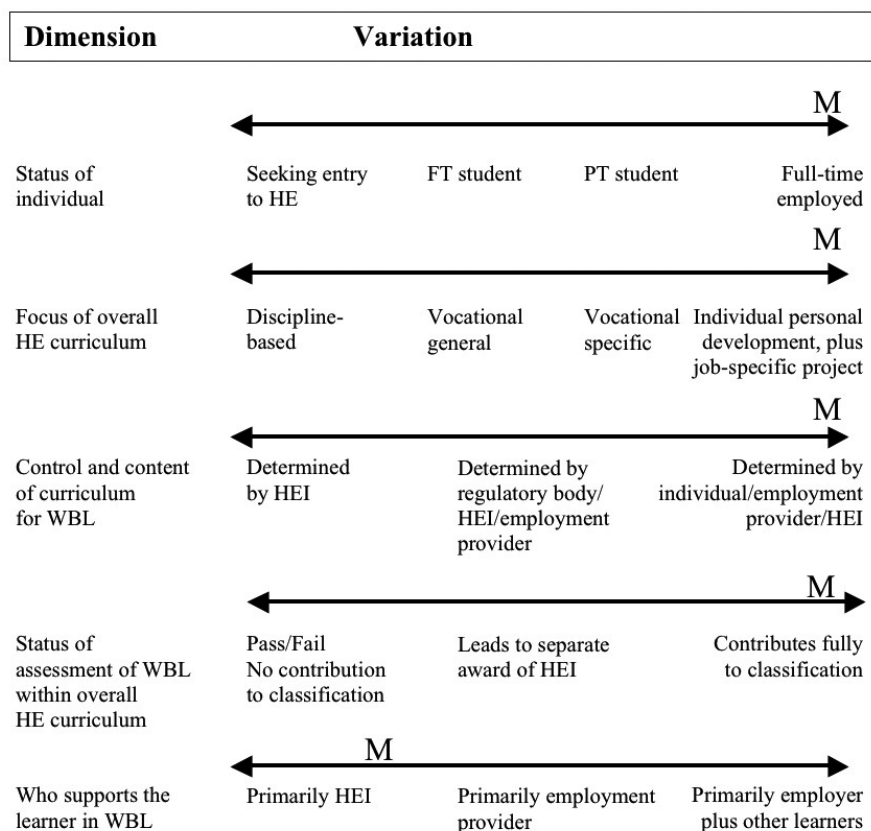
From the outset Work Based Learning Studies was learner centred and learner managed. Full use was made of accreditation to recognise and build upon

the learning already possessed by individuals and organisations. This provided a starting point based upon the knowledge of the workplace rather than a prescribed discipline-based curriculum. Future work-based learning was driven by real-life projects of significance to the workplace (Garnett, 2005). Work-based learning programmes were negotiated not just with the learner and the University, but also with the sponsoring organisation (often an employer). Work-based learning used the full qualification framework of the University and was aligned with the normal quality assurance framework of the University. In 1995 this combination of features was unique within and to Middlesex University.

The creation of the Work Based Learning Studies subject area was dependent upon the existing systems and structures of the University. Work Based Learning Studies was supported by existing curriculum structures of the University, which operated on a credit-based modular system. The University already had approved regulations and procedures for the accreditation of the prior and work-based learning of individuals and external courses and the University assessment regulations were designed to facilitate accreditation and WBL. Originally WBL was positioned as a subset of 'independent learning' and drew upon independent learning curriculum tools such as learning agreements and negotiated project modules (Osborne, Davies and Garnett, 1998). Figure 4.1 shows Middlesex work-based learning generally positioned at the end of a continuum developing practices that are focused upon the learning of the workplace and hence employers and employees. However, it is noticeable that the University appears relatively conservative in respect of control of assessment.

From the outset Work Based Learning Studies enhanced the intellectual capital of Middlesex University (Garnett, 2001) as it provided a framework for developing work-based programmes across all higher education qualification levels from certificate to Masters, which could be customised to the needs of the individual and/or the organisation. This approach proved very attractive to learners and their organisations and was recognised by the award of a Queen's Prize to the University in 1996 for 'excellence and innovation' in WBL. This combination of rapid growth in student numbers and high-profile external recognition led the University to see restructuring as an opportunity to consolidate the WBL provision.

Figure 4.1: The Middlesex position on the Brennan and Little (1996) dimensions of work-based learning framework



M = position of Middlesex University
 Adapted from Brennan and Little (1996, p. 65)

Phase 2: Mainstreamed within standard delivery and organisational structures

In 1997 NCWBLP became part of the new School of Lifelong Learning and Education, thus being mainstreamed within the management of the academic provision of the University. In the same year the University extended the principles of work-based learning to doctoral-level study and validated a framework for a credit-based professional doctorate that allowed candidates to negotiate a

programme designed to demonstrate their ability to satisfy the doctoral-level descriptors validated by the University.

Other areas of the University were interested in the potential of work-based learning. This led to the creation of a WBL and Accreditation Unit in the School of Health and Social Sciences, the validation of a work-based Masters by the School of Arts and a cloned undergraduate and postgraduate framework by the Business School. The School of Health and Social Sciences chose to work with the generic programme framework held by NCWBLP rather than invent and operate their own. This School use of a generic framework proved to be successful and led to very close partnership working between the School and NCWBLP, which stood the University in good stead in the 2003 institutional audit review of WBL and the 2004 subject review of Work Based Learning Studies. These reviews were very successful and showed that work-based learning was well suited to performing against standard quality assurance benchmarks (Garnett, 2009). The successful mainstreaming of WBL provided such strong and extensive evidence of excellence in teaching and learning that Middlesex University was successful in winning HEFCE designation as a Centre for Excellence in Teaching and Learning in Work Based Learning in 2005. A key part of the Centre for Excellence proposal was bringing together the pockets of good practice in WBL that existed across the institution. The operational experience of the CETL and the continued success of HSSC working with NCWBLP highlighted the potential for co-operative development (see Garnett *et al.*, 2009) and the extent to which the previous development of cloned modules, programmes and support structures was unhelpful.

Phase 3: Pan-University recognition and development

By 2006 Middlesex had a proud record in WBL, but it was felt that much more could be done to capitalise upon it as a strategic asset for the whole University. The new Deputy Vice-Chancellor Academic encouraged the WBL community to bring forward a range of options to achieve a step change in the scale and scope of WBL. The option that was preferred by WBL practitioners and by the University Executive was the creation of the Institute for Work Based Learning, which would have academic, quality, management and budget responsibilities as if it were a school and had an explicit mission to work with all four schools of the University. The Institute focused upon the potential of WBL as a strategic tool for workforce development and the recognition, creation and use of working knowledge for organisations.

The Institute was developed to make a significant contribution to the priority areas identified in the Corporate Plan of the University by making an important and increasing contribution to part-time UK and international recruitment at undergraduate, postgraduate and doctoral level. Through the Centre for Excellence in Work Based Learning, the Institute sought to build capacity and develop and disseminate excellence in learning and teaching. The Institute combined programme delivery and staff and curriculum development with accreditation, consultancy and research.

The strategic priorities of the Institute were to establish Middlesex University as a leading provider of workforce and organisational development at higher education level in the UK and internationally by 2012. This was to be achieved by building and brokering strategic networks and partnerships focused upon the development and harnessing of expertise in WBL for workforce and organisational development.

Phase 4: Strategic development as central to the University's Employer Engagement Strategy

In 2008 Middlesex had the opportunity to seek major developmental funding for employer engagement from the HEFCE Strategic Development Fund. The University wished to build upon its strength in WBL and professional education and was encouraged to do so by HEFCE. The establishment and operational experience of the Institute for WBL meant that the University already had well-established plans and structures to draw upon. The potential for partnership working was well established (see Garnett *et al.*, 2009), but it was also evident that there were deep-rooted administrative, marketing and financial management issues that would need to be addressed if major growth was to be obtained.

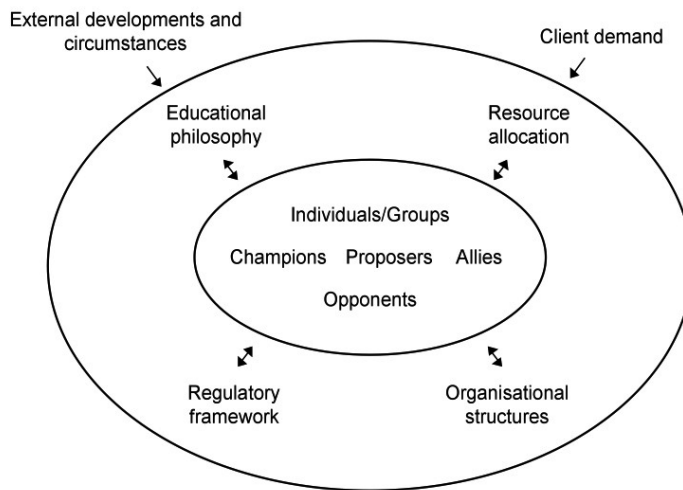
The proposal to HEFCE successfully gained £10 million funding over a three-year period to establish the Middlesex Organisational Development Network (MODNet). MODNet is centred upon Middlesex University and a core of strategic partner colleges and private sector providers. MODNet works with employers and third party providers to co-design and often co-deliver flexible and work-based learning at a time and place to suit the employer and employee. MODNet provides the University with a proactive business- focused marketing capability and drives the development of University administrative, regulatory, quality and financial systems to support highly flexible provision. The MODNet initiative is also a means of effecting significant change within Middlesex by establishing engagement with employers as a significant element of mission, practice and output. This is intended to transform the institution's approach to higher education for those in employment and for employers.

The development of MODNet is directly in line with the University's commitment to deliver outstanding career-focused courses and to develop new knowledge and skills of benefit to students and to business. A further key element of the Corporate Plan is the aim to increase part-time and off-campus student numbers with delivery by both Middlesex and partner organisations. This proposal clearly supports this aim as the intended outcomes will change the balance of part-time to full-time provision and on- to off-campus student numbers at Middlesex. MODNet directly relates to sustaining teaching quality through the expansion of excellent teaching and learning practice in WBL. The further development of the WBL curriculum and WBL modes, partnership working and the introduction of new employer-related courses will enhance the student experience and make a significant contribution to growing the income of the University. MODNet addresses issues of academic and administrative infrastructure that will add to the productivity and efficiency of the University as a whole.

Conclusions

The institutional decision to establish and then develop WBL as a strategic priority was a 'political' one rooted in the institutional mission. A core consideration for WBL is the philosophical position taken by the institution to it on epistemological and educational grounds. By accepting WBL as a field of study, the Academic Board of Middlesex University enabled it to be regarded as a subject area for structural and procedural purposes, e.g. it had specific WBL programme structures, level descriptors, module learning outcomes, a subject handbook and a WBL examination board making recommendations for the award of qualifications in Work Based Learning Studies. The location of WBL within one school of the University contributed to a close alignment with the quality assurance procedures of the University. It may also have been a barrier to take up of WBL in the other schools of the University. There has been a need to reinvent WBL that was not strategically addressed until the creation of the pan-University Institute for WBL in August 2007.

Figure 4.2: The 'political' arena for university WBL



The 'political arena' for the development of university WBL is depicted above. Decisions leading to the phases of WBL development at Middlesex were influenced by a range of internal/external factors, not least the prevailing policy context, availability of external development funding and the evidence of demand from paying 'customers'. Throughout the development of WBL at Middlesex the role of high-level champions, activists and allies in paving the way for curriculum innovation by changing or refining thinking, structures and procedures in the key areas of educational philosophy, resource allocation, organisational structures and regulatory frameworks has been crucial (Garnett *et al.*, 2008). The Middlesex experience shows that these are not one-off issues, but remain core to the implementation of WBL.

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5. Reorientating institutional systems to support the flexible learner

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Introduction

Higher education institutions (HEIs) are under increasing pressure to respond to the learning needs of a diverse student body of full-time, part-time, off-campus, open, distance and work-based learners. Responding to the Government target of engaging 40% of the workforce in higher-level learning by 2020 requires a new agility in higher education systems that to date have been primarily geared to support full-time or more conventional part-time learners. This chapter considers some of the issues in reorientating HEI systems to facilitate employer engagement through flexible start dates, study modes, pace of learning, short courses, CPD, distance learning and quality assurance systems. Drawing on the findings of a University of Greenwich study (University of Greenwich, 2006) on part-time and flexible learning, a subsequent institution-wide project called UG-Flex funded by JISC, and on developments in distance learning at the University of East London, it will examine issues and proposed solutions in adapting systems and processes to support the flexible learning sought by employers and new approaches to curriculum design. In doing so it also makes recommendations about the approaches that HEIs might take to support such learning across a range of dimensions from programme approval to student support.

Context for part-time learners

A number of developments in part-time learning also impact on the need for greater flexibility with predictions that over the next ten years part-time learning will become

of greater significance at a time when the number of full-time young learners is likely to decline. At national level, part-time student numbers represent an important proportion of all higher education students (Corney *et al.*, 2008). The Universities UK (UUK) (2006) survey of part-time students in higher education found that over the period 1997–98 and 2003–04 part-time students exhibited three times the level of growth of full-time students. However, recent evidence from HESA suggest a levelling off, or even slight decline, in demand for part-time programmes accounted for by the increasing proportion of 18-year-olds entering higher education over the last 15 to 20 years. There were 840,000 part-time higher education students in the UK in 2004–05 representing 40% of all HE students. Within the UK 60 HEIs have more than 5,000 part-time students, 48 of which have between 5,000 and 10,000 students. The majority of part-time students are studying for undergraduate awards or undergraduate credit. The UUK (UUK, 2006) report suggested that future growth is likely to be most evident in the postgraduate and CPD market. However, it is also evident that changes in fees are increasingly likely to have an influence on patterns of growth, due to price sensitivity in the market, particularly at undergraduate level.

The demand for flexible, work-based and part-time provision has also been stimulated by the work of Lifelong Learning Networks, regional consortia of HEIs, FECs and other stakeholders, with a remit to promote and support vocational progression through more flexible programmes of learning. They have enhanced debate about the need for: smaller bites of learning, programmes that can incorporate a wider variety of learning, programmes that can respond at any time, rather than being constrained by the traditional academic-year cycle, and study opportunities that provide a level of flexibility not widely found across all institutions. The work of such networks has arguably led to an increased emphasis on short courses, bridging programmes and CPD. The Lifelong Learning Networks have, in particular, supported a range of pilot projects involving smaller programmes of learning delivered for employing organisations.

While widely embraced, working with employers provides a range of challenges for HEI capacity to deliver and respond to demand-led education for employers and individuals. It requires institutions to think about the inherent flexibility of their systems, about curriculum content and delivery, responsiveness and their ability to meet the needs of the wide body of learners in the workplace. It has been suggested that, among other things, customised and work-based learning is too complicated and demanding for university systems and is not cost effective (Costley and Armsby, 2008; Garnett, 2007). While generic frameworks and economies of scale can be made, there are clear implications for resources in terms of developing institutional

structures, policies and procedures (Harvey, 2008). Garnett (2007) suggests that “HEIs remain deficient in the development and implementation of approaches and structures for initiating and facilitating the construction and operation of work based learning partnerships between HEIs and other providers of high level learning (especially employers)”. Foundation Degree Forward (FDF) has identified a number of barriers to such activity including lack of: senior management strategy and support, staff capability, cross-institutional debate, assessment practice, AP(E) L, and responsiveness and lead-in times (FDF, 2009). Such responsiveness covers not only approval, but also structure, attendance, start and finish dates, offering of staged awards and location of learning. The Kent and Medway Lifelong Learning Network’s (KMLLN) 2008 research study into employer engagement and work-based learning found the need for institutions to have: “flexible, validated frameworks with inbuilt quality assurance measures which ensure that engagement with employers or individual employees can be rapid and responsive, without compromising academic standards. Dedicated staff are in place who have the knowledge, skills and experience to provide a range of products, as required, for the employer and/or employed learner and who can work with employers and facilitate the development and delivery of a programme within a few months” (KMLLN, 2008).

Of course much of this is not new; writing in the mid-90s, Brennan and Little (1996) looked at a number of different models of employer engagement and work-based learning, and through the work of the University Vocational Awards Council there has been a developing academic debate on work-based learning and negotiated learning (Garnett and Young, 2007, 2008). However, for many institutions initially embracing such developments, they traditionally ran alongside, in a silo, or as an adjunct to, the main learning offer and didn’t necessarily involve the whole institution. The current debates and changes are likely, however, to have much greater significance through the need to involve a larger number of learners and to cover more than just work-based learning; they therefore, arguably, require whole-institutional responses.

Implications of supporting flexible learning

When the scale of flexible learning activity and work-based learning or employer engagement programmes is small, this can generally be managed through local arrangements and the manual manipulation of university systems. However, when, and if, such activity becomes more mainstream, then arguably it necessitates a more

fundamental look at systems and processes and requires institutions to address a number of key questions, including whether university systems are too focused on meeting the needs of full-time students, and on more traditional patterns of full- and part-time learning and whether they have the capacity to develop and support a demand-led offer.

It is evident that in many institutions (Paulucy and Noble, 2001; Garnett, 2007, 2008; Costley and Armsby, 2008) there are a number of barriers that may inhibit the required level of flexibility and the need for approaches at a whole-institutional level, rather than piecemeal responses involving only part of an institution.

A useful checklist for institutions thinking about the implications of supporting flexible learning and employer engagement includes asking whether systems can support:

- flexible start and completion dates;
- different delivery modes;
- self-paced learning;
- an individually designed curriculum;
- the incorporation of employer-based training and in-company training into programmes;
- accredited short courses and different module sizes;
- credit recognition and transfer;
- accreditation of prior (experiential) learning (A(P)EL);
- interim and staged awards;
- different fee structures;
- the responsiveness required by employers and, in particular, the need for a quick turnaround in approval and decision making;
- flexible approval timescales and planning deadlines and procedures to meet the short timescales frequently required by employing organisations;
- demand-led curricula and, for example, award of named titles on exit/award achievement.

The following case studies from the University of Greenwich and the University of East London look at two contrasting ways in which institutions address the issues of supporting employer engagement and flexible learning. The case study of the University of Greenwich focuses on the need to reconsider administrative systems and structures and for the University of East London on the challenges associated with making a fundamental change to an institutional vision. Both case studies aim to be relevant to institutions embarking on new endeavours in flexible learning and employer engagement.

Case study: the UG-Flex project at the University of Greenwich

The University of Greenwich is a large, post-1992 institution with more than 25,000 learners spread across three campuses in London and the South-East, a network of 13 further education and specialist institutions and a large and growing number of higher education partners overseas. As a large, vocational and diverse institution, it has a long history of supporting part-time learners and of working with employing organisations, with part-time learners comprising some 40% of the student body. The University was, for example, at the forefront of many developments in work-based learning, credit accumulation and transfer and credit rating of in-company learning in the early 1990s and had also offered a number of large distance learning programmes in, for example, health and post-compulsory education and training.

By the early 2000s there was some evidence that its traditional part-time markets were changing and that in order to meet anticipated changes, there would be a need to consider carefully the ability of University systems to support the changing nature of part-time, flexible and work-based provision. In 2006 a part-time and flexible learning short life working group was established to consider current levels of part-time provision and the changes the University would need to undertake to support a more flexible learning offer (University of Greenwich, 2006).

The group was established in the context of variable fees, widening participation and likely changes in demand for part-time provision with potentially enhanced emphasis on CPD and short-course provision, changes in delivery patterns and increased use of distance, e- and blended learning.

Five modes of study were identified that were currently offered to meet flexible learning viz:

- short blocks of full-time study of less than one year's registration (including the institution's Summer University);
- block study;
- day and evening part-time study (includes Associate Students);
- daytime study (primarily infill to existing courses);
- distance learning.

The University's review of study modes and of dedicated part-time provision suggested that there were opportunities for the University to adopt a wider range of delivery modes for part-time students that might include:

- infill into conventional programmes of study;
- day release;
- dedicated evening provision;
- block delivery of courses e.g. over:
 - one week;
 - weekend (once a month);
 - Friday/Saturday;
- e-learning and supported open learning;
- work-based and negotiated self-paced learning.

Many of the more creative modes of delivery could be facilitated through the sequential rather than parallel delivery of courses, and this would be particularly important for block and weekend delivery.

As demand for more conventional part-time study or full award-bearing qualification routes had stabilised, and in some areas declined, there had been some increase in students registering for institutional credit only and on short courses. This had created a number of challenges to University systems, which had been primarily developed to accommodate students following year-long periods of study, and resulted in the development of locally devised arrangements to register part-time students. The different approaches used to register students on part-time programmes and short courses suggested that there was a need for a radical rethink due to the diversity of practices involved.

The report also recognised that the distinction between full- and part-time study was becoming increasingly blurred and that it is not always appropriate to consider students as two separate groups. This is particularly the case with a growing number of foundation degrees developed with employers. Any changes made to encourage and accommodate a larger number of part-time students would thus be likely to be of benefit to all students through enriching flexible learning opportunities for all students.

The University recognised that, if it was to expand part-time and short-course provision and increase the level of flexible programmes undertaken jointly with employers, it would require detailed consideration of processes at each stage of the student life cycle from enquiries and applications to registration, progression and award of credit decisions, and where the locus of responsibility should lie between academic and administrative units.

The report recommended the need to review:

- admission arrangements for part-time, flexible and employer-based programmes;
- time frame and resources for registration and administration of students;
- short-course provision and the systems, processes and resources to support short courses;
- resources and infrastructure needed to support part-time and flexible study;
- consideration of the implications of greater use of extended days and weekends for, for example, information and learning resources and catering;
- timescales to achieve major benefits;
- marketing of flexible and part-time provision;
- resources and staffing to support flexible, part-time and work-based provision.

The report of the Part-time and Flexible Provision Working Group (2006) engendered a wider debate in the University about systems, processes and infrastructure. Although arguably there were very flexible programmes already within the University of Greenwich through part-time, continuing professional development (CPD), in-company and distance programmes, as well as short courses, the current processes, from inception of the idea for a programme or course through to registration and delivery, were considered as part of processes that were designed over ten years ago, when the academic models and student demographic were very different.

UG-Flex

When JISC made a call for projects in the area of institutional approaches to curriculum design, the opportunity was taken to bid for project funding to undertake the required strategic and organisational change. The outcome of the bidding process was that the University of Greenwich was one of 12 institutions to secure JISC funding.

The funding was used to establish a new project called UG-Flex that aimed to reveal and enhance the University of Greenwich's curriculum development processes in order to support a more flexible and diverse curriculum underpinned by agile systems. A primary driver was the University's strategic aim to substantially increase efficient and effective flexible and part-time learning provision in a changing marketplace (see the UG-Flex website: www.gre.ac.uk/offices/ILS/cis/projects/jisc-project).

The project commenced in late 2008 and is set to run over three and a half years until July 2012. The project has employed a Project Manager, a Business Analyst and a Programmer to work with a core team of University staff drawn from Information and Library Services, Corporate Information Systems, and Student Affairs, and a range of other stakeholders from across the University and externally. Involvement of a wide range of stakeholders was important in identifying key requirements for systems design; they include:

- Internal – University Executive, Heads of School, Directors of Learning and Quality, programme leaders, course teams and administrators, University Offices (notably Student Services, Planning and Statistics, Learning and Quality Unit, Facilities Management, Recruitment and Admissions, and Marketing) and students;
- External – employers, employees, prospective students, JISC, partner education institutions in the UK and overseas, policy makers, critical friends and evaluators.

Support from senior management is seen as a key element to ensure institutional buy-in and the Project Steering Group is chaired by a member of the Vice-Chancellor's Office. The group consists of senior University staff, student representatives and external associates. Operational project matters are dealt with by a Project Management Group, which consists of the core project team and representatives from schools and offices contributing to project delivery.

The support provided by JISC in building networks with other institutions and in sharing effective practice is also seen as important, and the University of Greenwich is a member of a cluster of projects working on aspects of curriculum design with Birmingham City University, the University of Cambridge, Cardiff University and City University London. Additionally, projects at Manchester Metropolitan University, the University of Bolton and Staffordshire University have been identified as being relevant through addressing similar problems (JISC, 2009, see www.jisc.ac.uk/curriculumdesign).

The UG-Flex project is organised into five broad phases:

- Phase 1 (to May 2009) involved the establishment of project management infrastructure and research and analysis of current models and systems.
- Phase 2 commenced in May 2009 and involves stakeholders identifying the critical drivers and inhibitors to the development of flexible curriculum design and delivery.

- Phase 3 commenced in July 2009 and involves scrutinising stakeholder requirements to analyse where improvements in systems and processes are required.
- Phase 4, from January 2010, will pilot a selection of flexible curriculum models using the re-engineered systems, services and associated processes.
- Phase 5, from March 2011, will apply the lessons learned from the pilot phase to facilitate wider roll-out of systems and processes, combined with wider dissemination of outcomes.

In the first phase of the project, it was important for the core project team to think about the dimensions of flexible curriculum design, and for this the work of Collis and Moonen (2004) was found to be particularly helpful. Consideration was given to:

- delivery logistics;
- pedagogy;
- external factors (including availability of funding);
- timescales – approval, start, end, pace of learning, assessment;
- content – topics, sequence, learning resources;
- entry requirements – AP(E)L;
- reviewing regulatory and quality processes and procedures.

Baseline research and initial consultation with University stakeholders found that generally staff working on curriculum design were responding to strategic directives to innovate in new flexible curriculum models and had developed some well-received models of online learning, short-course provision and collaborations with employers to deliver CPD and other learning opportunities. However, staff typically face ‘behind-the-scenes’ challenges when they attempt to develop new levels of flexibility and, in consultation, cited a lack of clarity of processes, lack of accountability, insufficient guidance from central services/schools, laborious administration, lack of access to resources and knowledge and systems that are neither transparent nor intuitive. Such challenges can be a real disincentive to staff who might otherwise develop new curriculum models, and for those curriculum designers who do persist in innovating new, flexible curriculum models, often because systems and processes themselves are not designed to cater for flexible study, each new model requires a one-off ‘workaround’ solution, which is often piecemeal, time-consuming and not scalable.

Some students, typically those following curriculum models that fall outside a full-time three-year undergraduate programme, find their experience of learning

affected by a lack of flexibility in the University's systems, policies and processes. Examples of poor experiences include: not being able to gain timely access to IT services and facilities, affecting access to learning resources and the ability to submit assignments; financial queries; lack of access to staff; and reduced or poor facilities on campus (e.g. catering, technical support, unsuitable or inappropriate teaching/study facilities).

This initial research confirmed that what is required is enhanced curriculum design processes and systems that could facilitate greater transparency to enable curriculum designers to develop flexible curriculum models, confident that the students who choose to follow these courses/programmes of study would have a quality learning experience.

To this end the project set the goal of achieving the following outcomes by 2012:

- an increase in the number of actual and planned flexible courses offered by the University;
- a percentage increase in the levels of staff satisfaction with support systems functions;
- a percentage increase in the levels of student satisfaction in relation to the organisation and management of the course, welfare resources and facilities;
- no less than 90% of new flexible provision and no less than 75% of existing flexible provision to be authorised, approved and reviewed within the University's published academic planning framework;
- a review of processes and systems designed to assist decision-making across the institution and inform wider policy decisions to ensure they are informed by the needs of all stakeholders, with recommendations.

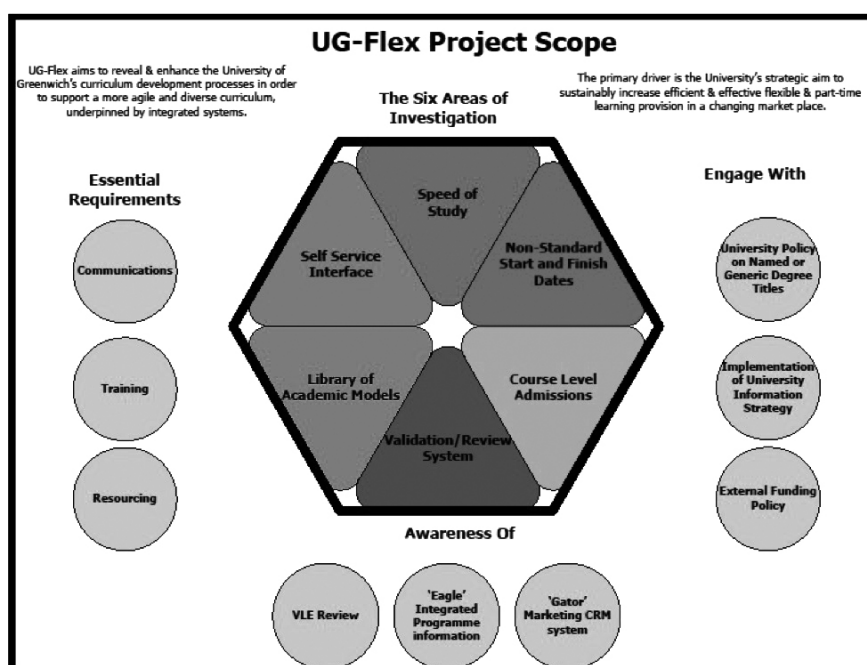
UG-Flex will also produce a range of specific outputs including case studies, a curriculum guide, a number of business process models, new academic models and interactive video and audio clips. The achievement of these project outcomes and outputs will involve a significant degree of organisational change, and this is being measured through a combination of formative and summative evaluation.

As the project enters its second year initial developments are already leading to some change. Stakeholder consultations with both academic and administrative staff have been found to be essential to ensuring buy-in across the institution with the consultation workshops using a Soft Systems Methodology technique, primarily 'rich pictures', to encourage stakeholders – who hold a range of views, priorities and interests – to work together to identify areas where they agreed change was needed. Information and feedback gathered at these stakeholder consultation

events has been synthesised into both a series of reports and a project scope diagram. In late 2009, the current proposals are that UG-Flex pursues six areas of investigation viz:

- speed of study;
- year-round start and finish dates;
- course-level admissions;
- self-service interface for students and staff;
- library of academic models;
- validation and review system.

Figure 5.1: UG-Flex project scope



The proposed project scope is being disseminated and feedback sought through key University committees, University Teaching Fellows, the portal, the project blog and both the University and Students' Union websites.

Technical developments

The University of Greenwich has a thorough development methodology based on the waterfall method for software life cycle management. While the student and associated systems are proprietary, from SunGard Higher Education (Banner), the University does have the source code and where necessary adds or alters processes.

It is recognised that managing development within a vendor-based system environment presents a challenge. Stakeholder feedback on the UG-Flex project emphasised the need for: enhanced functionality to facilitate more streamlined processing of data where there is concurrent curricula, variations in speed of study and year-round enrolment; an improved self-service interface for students to identify, select and pay for their study at course level and for staff to enhance access to data that meets their needs; and better tracking of course/programme validation and review dates and workflow.

By re-engineering the current information systems infrastructure to improve functionality the project aims to enhance both staff and students' experience of teaching and learning. It is also anticipated that an external audience, in particular other SunGard Banner universities, will be able, through the network of users, to use the enhancements to inform potential modifications in their own institutions.

Challenges

The project has faced a number of issues and challenges. In some schools and offices increased expectations have been raised of how UG-Flex can deliver better systems and processes, and managing these expectations will be challenging. In other schools and offices awareness of UG-Flex remains limited and there is little apparent active interest and a need, therefore, to convince staff of the relevance of the UG-Flex project to them.

The project has found that it is important to:

- *Accept difference* and recognise that people bring different and often conflicting priorities and concerns to a project. Stakeholders can have very different views on what the main issues or problems are. A key approach in the UG-Flex project has been to avoid trying to define the problem but to concentrate on identifying and drawing out shared issues through using Soft Systems Methodology.

- *Understand the institution's culture* through being sensitive to stakeholders' motivation for being involved in a project. Are they self-selecting or have they been delegated? Do they want to do any work or just be consulted? This can influence how they engage and what they are willing to contribute. UG-Flex has tailored strategies for engagement through one-to-one meetings, word of mouth, recommendation, invitation to workshops, online communication etc.
- *Not assume knowledge* as people retain different kinds of information. Even when a stakeholder has been provided with a thorough briefing and update, don't assume they will remember, provide short updates/briefing on the project and progress to date and maintain personal contact through individual emails to stakeholders.
- *Use official university committees* where possible. UG-Flex has found this an effective way to get the attention of senior university staff and staff in schools and in securing interest and buy-in to the project and developments, in particular from academics.

Case study: the University of East London

The University of East London (UEL) identified expansion of distance learning as a key institutional priority in 2004, reflecting the University's commitment to widening access to higher education and to providing learners with choices and innovative modes of delivery. A key part of the strategy was to create a centrally based unit to lead on achieving the required support, quality assurance systems and infrastructural diversity to enable success.

Since 2004, distance learning has been firmly embedded as a key aspect of UEL's provision, and now with over 4,000 distance learners, UEL is regarded as one of the market leaders in distance learning delivery. Distance learning at UEL is centrally managed, initially through the specially created School of Distance and e-Learning (SDEL), and now through the newly formed unit, UELconnect. The UELconnect unit retains the responsibilities of SDEL with regard to distance learning, but operates with a wider remit particularly geared to expanding employer engagement within the institution. A number of practical solutions were developed to address the challenges in creating this new strategic approach.

It was vital to recognise that the adoption of a new learning and teaching remit needed to take place hand-in-hand with adaptation of support mechanisms. It was

clear at an early stage that the potential impact on information and support systems/ infrastructure and the desired expansion would require the development of new support systems in a way that might not just bolt-on to existing systems.

There was a need to focus on changes in several key areas:

- centralisation – necessary to ensure a coherent strategic approach to the development, implementation and delivery of distance learning across the University;
- quality assurance – new processes required to provide a consistent approach to quality assurance of new distance learning programmes;
- academic framework – revisions to the existing academic framework would be necessary to create flexibility for distance learners;
- learner support – new student support systems would be essential to enable distance learners to study successfully.

A centralised approach

Creating the School of Distance and e-Learning enabled UEL to take a completely new, and centralised, approach to the provision of distance learning. A high level of collaboration was required with the academic schools for three reasons, first to ensure consistency of approach, second to allow academic schools to focus on delivering their core competence of academic expertise in specific subject areas, third to enable the central unit to provide the specific expertise in developing and delivering distance learning.

This approach meant there was a centralised unit able to take the lead in determining the infrastructure changes required to facilitate distance learning provision. Key roles undertaken by the central unit include:

- Learning Designers – with expertise in the design of distance learning courses. The learning designers work with the academics to develop the content, thus removing the requirement for the individual academics to be experienced in distance learning;
- Project Managers – to ensure the efficient delivery of new programme development;
- Distance Learning Support Advisors – trained in meeting the specialist requirements of distance learners and supporting online learning.

Private sector partnership

A cornerstone of the success of distance learning provision at UEL has been the decision to partner with private sector partners, experienced in distance learning operations. Of these current partners, ICS who were an original partner, remain a major collaboration partner. ICS (International Correspondence Schools) is the world's largest and most experienced provider of distance education. Founded in 1890, more than 13 million learners have studied with ICS, and today they offer over 150 distance learning courses covering a wide variety of topics. Previously a wholly owned subsidiary of the Thomson Corporation, ICS has recently been acquired by the Cornelson Group, which will facilitate further strategic development of this partnership.

The UEL/ICS partnership allows a blending of the core competencies of each organisation and is viewed by both organisations as a mutual learning opportunity; UEL contributes the academic expertise and understanding of the requirements of offering higher education qualifications, while ICS contributes their experience of a long history of marketing and delivering distance learning. A centralised structure has been of key significance in the effective management of both strategic development and day-to-day operation of this partnership in particular due to the fact that distance learning with ICS represents programmes from six academic schools; a devolved approach would thus have presented a number of management challenges.

Quality assurance

With regard to quality assurance, new distance learning procedures were created for development planning, initial approval and programme approval. It was decided that any new development of distance learning programmes must be planned in consultation with SDEL. This would allow a consistent and University-wide approach to testing the viability, scope and investment requirements. Changes have been made in three main areas: approval processes, expansion of the remit of approval procedures for a wider range of flexible learning, and revisions to the academic framework.

An entirely new approach to approval processes was introduced for distance learning programmes. Rather than programme approval being managed via the normal School Quality Standing Committee route, all distance learning programmes are approved through a centralised event, managed by the Quality Assurance and Enhancement team. The programme team seeking approval is comprised of

representatives of the distance learning team, academics from the particular school and partner representatives, if relevant. The approval panel will consider all aspects of the proposed programme including: reviewing the print/online materials; the delivery system proposed; the infrastructure and roles and responsibilities of the programme team and student access to UEL support, systems and guidance services.

Recently, these procedures have been updated to include not just distance learning, but also blended learning programmes and the growing number of work-based learning programmes now offered by UELconnect. The introduction of a new Short Course Approval Panel has also facilitated a speedier and more efficient process for approving short course provision, which is now a key aspect of UELconnect strategies.

The UEL Academic Framework was also revised to support distance learning requirements through creating a separate Academic Framework for Distance Learning. The new DL Academic Framework provides for modules to be designated at approval as either 'on-campus' modules, 'distance learning' modules or approved as both. The DL Academic Framework also allows for greater flexibility for off-campus learners through assessment, pace of study, study load and open access.

- Assessment – distance learners can enrol on a 'roll-on, roll-off' basis, with assessment points being whenever the next available assessment point.
- Pace of study – unless otherwise dictated by professional body requirements, the distance learner has a maximum of eight years to complete a full undergraduate programme. The study load is also varied for distance learners (this also accommodates on campus students opting to study some modules by distance learning). Distance learners can study up to 180 credits in one calendar year, although the normal study load would generally be 40 credits per semester. Where on-campus and off-campus modules are being studied within a programme, then the learner can study for a maximum of 140 credits in one calendar year.
- Open Access – learners are able to enrol on the first two modules of a distance learning undergraduate programme without having the usual prerequisite UCAS points. Successful completion of these two modules then allows the learner to enrol on the full programme.

Student support

A new approach has been put into place for supporting distance learners, whether they are studying entirely through UELconnect, 'direct delivery' flexible learning programmes or through partner providers.

The UELconnect team of flexible learning student advisors provide both proactive and reactive support and guidance on non-academic issues to direct delivery students. The advisors provide motivation and encouragement, assist the student in creating a study plan, engage them in interacting with peers and tutors within the online learning environment, and help learners resolve the common challenges of combining work, family and study commitments in order to succeed as a distance learner. The student advisor liaises with the academic tutors to ensure a joined-up approach to supporting the learner. With an increasing range of delivery modes the team of advisors support not just distance learning students, but also learners on blended learning courses, and on the recently launched work-based learning programme.

Employer engagement

Building on the success of the introduction of distance learning, UELconnect was formed to expand the offering and to promote opportunities for employer engagement at the University. UELconnect is now developing a new portfolio of online and on-campus short courses, work-based learning programme, blended learning programmes and successfully offers a range of e-learning consultancy services on a commercial basis to external organisations. This approach enables the unit to fully engage and work with the client to develop their learning strategy. This generally includes:

- reviewing the employers existing training and development provision;
- recommending how e-learning could be effectively integrated to their current provision;
- developing bespoke online courses;
- recommending appropriate learning technologies to deliver their courses;
- providing staff development on e-learning;
- providing staff development in supporting online learners;
- assisting with evaluation.

Establishing an entirely new unit to develop and manage flexible learning solutions across the whole University has been a successful, but demanding, initiative. It has enabled new systems to be introduced and facilitates the continued growth and expansion of new areas of activity within the University.

Recommendations

The two case studies illustrate contrasting approaches to looking at how institutional systems can be adapted and re-engineered to support curriculum design to facilitate employer engagement activity and flexible learning. In the case of the University of Greenwich the project is still to be completed, while at UEL flexible learning and the systems to support it are under continual development. Important lessons and guidance has emerged.

It is evident that there is a need for a proactive approach by higher education institutions and a need to anticipate demand. If demand for particular type of activity grows in the absence of any planned approach, then it is likely to lead to growth of local 'feral' systems and an inability of an institution to scale up activity to the desired level. There is a strong argument that if systems can be designed to support flexible learners then they will be systems that are fit for all learners. It is also evident that there is a place for some form of centralisation in the development of systems to facilitate and co-ordinate developments, to ensure consistency of approach and to provide support for the locus of academic delivery. Work with external partners is also important both for benchmarking initiatives and sharing good practice, as well as drawing on expertise and avoiding 'reinventing the wheel'.

Criteria for success in developing university systems to meet flexible learning needs include the need to:

- harmonise the initiative with strategic objectives;
- gain sponsorship by senior management;
- communicate the vision;
- have realistic timescales;
- establish effective project management infrastructure;
- establish collaborative arrangements;
- undertake baseline research, analysis and evaluations;
- map, evaluate and review current processes and procedures;

- effectively communicate and disseminate project objectives and progress;
- identify, review and share best practice external and internal;
- be responsive to different needs and expectation – undertake inclusive consultation and involve a wide range of stakeholders (academics, administrative staff and managers) in all aspects of systems design and delivery;
- commission independent evaluation;
- avoid ‘feral’ systems;
- use technology at key points in supporting systems.

The development of systems to support flexible learning remains an ongoing challenge and an area where arguably not enough has been written, with many issues appearing in primarily ‘grey literature’ and as a result of validation and approval events (Costley and Armsby, 2008). Terms like ‘non-traditional’ and ‘non-standard’ when used to describe part-time students, CPD modules, distance learning and short courses and other forms of flexible learning will become increasingly problematic because they suggest some favouritism towards full-time students. External drivers, notably the regulatory environment, funding cuts and Government policy, are going to be of developing significance for flexible learning (BIS, 2009) and institutional initiatives will need to factor these in. As institutions scale up activity in response to funding changes and policy directives the consideration of institution-wide approaches will assume greater significance with an attendant need to share approaches and practice. It is clear that responses need to be tailored to individual HEI structures and circumstances, but there are some common questions and criteria for success.

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6. Developing the ability of academic staff to work successfully with employers: enhancing expertise and creating opportunities

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Introduction

The inclusion of employer engagement in university corporate plans is increasingly widespread and although there is some recognition that, for universities to meet employer needs effectively, they need to develop new skills and a new culture among staff (Wedgwood, 2004), this does not have the prominence within the wide range of reports in recent years that it perhaps warrants. There has been little published about the difficulties universities face in growing this activity because of the lack of appropriate staff expertise and the related need for staff development. A report to HEFCE on strategies for workplace learning (Brennan *et al.*, 2006) commented that although many staff had experience of engaging with employers, if workplace learning is to expand on a distributed basis, where there is a sharing of the learning process between higher education and employment, then there must be changes in the roles of many members of academic staff. They concluded that there were major staff development issues to be addressed and that lack of such staff development was likely to lead to problems of confidence and credibility.

It is important that staff are able to equip their students, including those already in employment, with the ability to deploy in the workplace the skills and knowledge acquired and evidenced through their HE qualifications. This is reinforced through the Scottish Skills Strategy (Scottish Government, 2007), which explicitly recognises the importance of utilisation, not just acquisition, of those skills.

For university staff effectively to support the utilisation of skills and knowledge it is crucial that they are empathetic with the needs of employers, and that they understand the work context and appreciate the complexities of working environments. It is therefore crucial that HEIs commit to supporting staff in developing their abilities to do just that.

Birmingham City University context

Following the appointment of a new Vice-Chancellor in 2007, the University undertook a fundamental review of our mission and corporate strategy. Although we had a long history of vocational learning, including numerous links to professional bodies, we felt it timely to be more explicit about this aspect of the University's work. The revised vision for the University includes that we should be recognised as an exemplar for engagement with business, the professions and the community. We subscribe to the view expressed by DIUS (2007) that: "All HE institutions need to grow their capacity to engage on a large scale with employers, in ways adapted to their different profiles and missions. Those activities should share equal status with research and academic activities."

We felt that, for us to engage staff effectively in the employer engagement agenda, we needed to recognise fully the extent of the activity across the University. In exploring this aspect of our work it became clear that it was multifaceted and often highly complex. This has prompted us to look carefully at how we define employer engagement as we felt that too narrow a definition would unnecessarily exclude and potentially alienate many staff. We have therefore sought to include the many ways in which staff and students of the University interact with external organisations in the public, private and voluntary sectors. It includes: employers working with us to enhance the learning experience and employability of students; the University delivering learning to employees (workforce development); providing innovation to employers through research; transferring knowledge and support to employers; and helping our graduates get jobs.

Although we have a strong track record and many years of experience in some of these areas, in others we are at an early stage in our evolution especially when compared with the opportunities that are available. The University's current involvement with employers has evolved over a considerable period of time, but, in order to deliver against our corporate plan, this now needs to be far more strategic. A key aspect of this is the enthusiasm and ability of our staff to take on new challenges and new ways of working.

Developing the ability of academic staff to work with employers

There is no doubt that engaging with employers requires a different and expanded range of skills than those most commonly found in traditional university research and learning and teaching areas. Nowhere is this more evident than in workforce development, which is perhaps the most challenging form of employer engagement in terms of the skills required.

Table 6.1 compares traditional university teaching with workforce learning using several key characteristics. This table has been compiled to emphasise and contrast the differences. We acknowledge that in reality there is often considerable similarity and commonality between the traditional teaching and workforce learning approaches and would hold up our own provision as an example where many characteristics of workforce development are embedded in our normal provision. Even the most traditional universities embody some of the best elements of many of the workforce development topics presented in this table.

Table 6.1: Comparison of traditional university and workforce learning and teaching

	Traditional	Workforce development
Location	Mainly university campus	Often employer's workplace
Model of delivery	Mainly face-to-face	Often blended (distance, face-to-face, work-based) learning
Academic focus	Mainly education	Mixture of education and skills
Nature of curriculum	Significant theoretical and conceptual elements	Significant practice-based elements
Qualifications	Majority pre-packaged (e.g. diploma, foundation degree, taught Masters)	Often bespoke (e.g. non-accredited short courses and specialist postgraduate diplomas)
Student commitment	Usually full-time with some part-time	Usually part-time
Accreditation of prior experiential learning	Limited	Can be substantial
Teaching staff	Mainly full- and part-time university academic staff	Mixture of university academics, employer trainers and third-party tutors
Teaching materials	Developed and owned by university	Intellectual property (IP) often shared (university, employer, third party) and sometimes unknown
Funding	HEFCE and student fees	Mainly employer fees
Quality procedures	Well established with external review e.g. QAA	Existing procedures often inappropriate and perceived by employers to be cumbersome
Time to market for new course	Slow (years)	Needs to be fast (months)
Age of students	Majority 18–23	Majority mature (23+)

In our experience the academic staff that are most successful in employer engagement projects have some of the following attitudes, capabilities and experiences:

- enjoy exploring the application and exploitation of knowledge (innovation and enterprise), rather than just its creation (research);
- prior experience of working outside the university sector in a public, private or third-sector organisation;
- strong interest in and knowledge of the relevant professional (vocational) practice in their specialist disciplinary area;
- enterprising spirit and a willingness to deal with the challenges of sales and marketing, contracting, IP (intellectual property) management, project management and budgets, etc.;
- drive and enthusiasm to move into new areas beyond traditional academia.

We acknowledge that employer engagement is a team and not a solo sport and that each member of an employer engagement team does not need to be competent in all these areas. The challenge for universities embarking on employer engagement strategies is to ensure that all the essential ingredients for success are represented somewhere in a team (which may include both internal and external resources).

At Birmingham City University we have adopted a partnership model for employer engagement. The six faculties are the main delivery arms for the full spectrum of university research, learning and teaching, and community engagement activities. The work of the faculties is supported by a central unit, Research, Innovation and Enterprise Services (RIES), that establishes university-wide policies and procedures, and develops examples of best practices for externally funded projects. We have also been integrating the work of several of the University's service departments into our expanded employer engagement strategy. For example, Academic Registry has introduced a flexible framework to allow speedy but rigorous approval of accredited workforce development, and has reviewed and adapted standard materials such as the Student Handbook for work-based learners. Corporate ICT is addressing identity management, IT usage and platform support issues. We have also recently extended the remit of our HEFCE-funded Centre for Excellence in Teaching and Learning (CETL) – the Centre for Learning Partnerships – so that, in addition to its original focus on the health sector, it will be able to support staff across all areas of provision in developing appropriate learning and teaching approaches for working with employers.

A number of our staff are not by natural inclination highly enthusiastic about

employer engagement, and we assume that we are not alone in this regard. Transforming our academic staff resources so that collectively they are able to meet the challenges posed by employer engagement is being achieved in two ways, via both recruitment and development approaches. New appointees arising from staff turnover have been selected in part based on their interest in and abilities to develop discipline-specific professional practice and to work with employers. We have also instituted a number of approaches to develop and support the existing staff including training in bid development, pre-contract project appraisal and project management. In the next section we outline three case studies that describe some of this work in more detail.

Case study: Service by Design

At Birmingham City University, we have created a unique and successful internal academic staff development initiative incorporating a novel approach to engaging with external organisations. This has been a ‘catalyst for change’ for academic staff who have experienced a direct boost to their teaching, research and/or knowledge transfer activities through external engagement.

With the support of HEFCE funding we selected a service design approach as it matches well with the University’s established curriculum and because service is key to creating competitive advantage across a wide range of sectors. We worked with the Engine Group, a leading service design agency with a blue chip client list, to develop an engagement methodology and a professional toolkit, and in order to learn from the process we ran a full evaluation study. We recruited around 50, mainly academic, volunteers to the programme as Innovation Mentors with funding being made available to buy out some of their time. The benefits to the Mentors included an opportunity to try something new, to gain access to personal development, to work with staff from other faculties, and to learn about the wider offer across the University such as Knowledge Transfer Partnerships, graduate placements and student projects. The academics have been attracted by the title ‘Innovation Mentors’ as a name they like and in which they take pride.

The development programme comprises: a residential workshop to learn about a service design approach and what services the University can offer; a confidential psychometric profile; and social events and team-building activities. In the original programme other development needs were met responsively covering topics such as marketing, project management and sales, which interestingly was far more attractive to staff when labelled ‘creative engagement’. Innovation Mentors are asked to share their team

type to help form pairs of 'buddies' – one who understands the external organisation's sector and the other who can bring in ideas from another discipline/profession/sector. They are aided by preparation, advice and support from the central RIES team.

Before the Innovation Mentors work with a client organisation, the central team meets with the client to discuss mutual objectives and set expectations. The approach that Innovation Mentors then use with the organisation is well structured and therefore more accessible for inexperienced staff. It includes approaches such as a structured interview with a senior director, evidence gathering questionnaires with clients and managers, structured brainstorming with the client, and standardised templates for the Innovation Mentors to report back to the organisation. At all stages, the central team work with the Mentors 'back at base' to agree next steps.

The results from the evaluation research project showed beneficial impact for both the involved academics and organisations. For the Innovation Mentors, the Service by Design programme developed academics to function well as facilitators/critical questioners. 'Buddying up' helped creativity, confidence and trust-building and the development of multi-skilled teams. The Mentors felt that they enhanced their skills and techniques in external consulting. They were more able to adopt a facilitator role with organisations to contribute towards innovation. The directors of external organisations found that the engagements improved their absorptive capacity, ability to learn and innovate, and also generated trust, satisfaction, continuation commitment and a good perception of University capability.

The Innovation Mentors did not go into the organisation as expert consultants but rather as critical friends/agents of change. As a result they became more able to operate as 'engaged researchers', moving from being a 'translator' of research into a 'change agent' inspiring practitioners to initiate change. Over 90% of them felt it was of value to their teaching as they were able to draw upon the nature of multi-disciplinary working and the way in which the key features of the setting (including, for example, understanding of organisational culture) shaped the application of techniques. They were able to go beyond mere consultancy proposals and advice, and experience how implementation operated.

Although the Innovation Mentors were all volunteers there was some initial apprehension. However, Service by Design has helped us to create academics that are enthusiastic and who encourage others to engage with the original and ongoing phases of the programme. They say that they have become more confident at engaging externally and are using their experiences to create a more vibrant curriculum, enriched student experience, opportunities for research and more external engagement. The challenge for us has been how we could continue this programme post-funding. Its value in enhancing staff capability has been such that we have continued to support it from the University's

HEIF funding, but the challenge remains as to how the staff skills developed can deliver a reasonable return on investment longer term. As the University moves to setting clearer expectations and targets for faculties around employer engagement then there will be encouragement to utilise the skills developed among our Innovation Mentors.

Case study: project appraisal and management

As we have noted above there are many aspects of employer engagement that can touch almost all aspects of the work of universities. Perhaps the greatest area of risk for universities is when employer engagement projects involve commercial work with third parties. There are various kinds of risk to which a university can be exposed:

- reputational risk can range from adverse publicity in local media to a major loss of public confidence;
- resource risk ranges from limited dependency on a team to direct dependency on a single team member or piece of equipment;
- legal and contractual risk ranges from use of standard university terms and conditions to new contracts governed by non-UK jurisdictions;
- financial risk ranges from projects with a modest value with a large surplus, to large projects with small surpluses (or losses) or even worse open to 'clawback' if the contracted outputs are not delivered.

In order to mitigate and control risks for external employer engagement projects we have developed both pre- and post-contract project appraisal and audit policies, and associated staff development delivered in-house by University staff. This is being enhanced to incorporate the concept of senior managers needing to be licensed to enter into contracts for external employer engagement projects on the University's behalf.

Licensing is a relatively simple process for low-value, low-risk projects, which involves attending a short training course (half a day) that outlines University pre-contract appraisal policies and procedures, how to implement them and the supporting tools for risk management assessment. More detailed training is given to Faculty Financial Controllers and staff who routinely manage projects. RIES manages a best practice group of these people to share experience across the University.

Post contract award we require that all projects have an identified project manager. The University has developed a bid and project management procedure based

substantially on the widely used PRINCE2® methodology (OGC, 2009). PRINCE2® is a comprehensive process-driven project management methodology developed by the Office of Government Commerce. It uses a product-based planning and analysis approach to project management in which the first task is to determine the desired outcomes (products) and then to develop a methodology that will realise the products. Birmingham City University delivers a number of PRINCE2® courses for staff ranging from one to three days, which provide an understanding of PRINCE2® for managers and more detailed training in how to manage projects using PRINCE2®.

Initially academic staff are often reluctant to participate in the licensing and project management courses seeing them as overly bureaucratic and a distraction from their normal day-to-day activities. However, post-course evaluations about the value of the material presented and the overall approaches that the University is using to manage external employer engagement projects have been positive. As a result of implementing these pre- and post-project policies, procedures and related staff development, there has been a significant (but not complete) reduction in the number of projects with difficulties and an increase in the levels of financial success.

Case study: Redesign of Learning Experience (RoLEx) project

In 2008 the University took the decision to change the credit structure of undergraduate programmes. As this would require major programme redesign we decided to use this structural redesign to prompt a much wider review and redesign of the student learning experience, with the University's Learning and Teaching Strategy being used as the main driver. This led to a number of key themes emerging that were strongly related to employer engagement. These included: involving employers in the process itself; designing programmes that are attractive to employers; embedding practice- and work-based approaches; and designing programmes that are flexible and can readily be adapted and changed to meet the needs of employers and employees. A further key deliverable was to have an impact on academic working lives by helping staff make the best use of their time while maximising their impact on the student learning experience. We believe that enabling staff to have more time to work closely with employers is an important aspect of achieving this aim and enhances the ability of those staff to deliver across a range of employer engagement activities.

One particularly creative approach has been adopted by Birmingham City Business School, which both frees up academic staff time and creates opportunities for staff to

develop their ability to work with employers. Prior to the RoLEx project, the Business School undergraduate provision included a complex range of generic and specialist programmes, specialist routes and joints, with first-year provision alone comprising more than 50 modules. It was clear that significant staff time was being expended on both the teaching and ongoing development of these modules. The RoLEx process involved a complete rethink of all the School's provision with significant rationalisation of awards and routes, and a major reduction in modules offered. This has led to a saving in module leadership hours and preparation time conservatively estimated as freeing up more than 3,000 hours of academic staff time. This is allowing Business School staff to commit an increased amount of time to activities that support their teaching, including research and employer engagement. In addition, the design of the student learning experience itself is providing staff with real opportunities to develop their own business knowledge, their consultancy skills and their links to employers.

A common first year has been developed for all joints, which involves a range of subjects being delivered in an integrated way. This reflects the needs of employers for integrative knowledge and necessitates team-teaching across the disciplines. Staff have therefore had to move out of their 'knowledge silos', are developing their own broader understanding across business disciplines and becoming better equipped to work with employers.

These joints, together with the BA Business Studies, have a first-year integrative enterprise project, which culminates in a *Dragons' Den*-style event with employers. This project uses a business model innovation approach adopted by leading business consultants such as Capgemini and Deloitte so that students learn how to apply powerful and practical innovation techniques as used by leading companies worldwide. Staff supporting the module are also developing and gaining experience of this approach to business consultancy, which is transferable to other aspects of the Business School's portfolio including workforce development and consultancy. A further change to programme design has been to allow the final-year dissertation to be replaced with a consultancy project for local companies. The supervision of such projects gives additional opportunities for academic staff to develop their understanding of and links with employers.

However, achieving this level of change and this degree of focus by staff on employers would have been difficult without bringing a number of new staff with extensive experience of employer engagement activity into the Business School. Developing the staff resource does sometimes need to include the import of new team members, but what is evident from the Business School experience is that it is crucial to then use those new staff to help drive and facilitate the development of existing staff rather than to see them as some form of new elite.

Conclusions

Universities are in the people business and the academic and support staff are the primary resource that a university possesses. Increasingly it seems that teaching, research and knowledge transfer are inextricably linked, especially in practice-based universities. There is a major challenge for universities embarking on an employer engagement programme to enhance the capabilities of the staff base. In our case sometimes this has meant enhancing the skills of existing staff, but in others it has been more appropriate to recruit new staff with different skill sets.

In this chapter we have outlined some of Birmingham City University's approaches to developing staff to support our employer engagement strategy. Each of the three case studies presented highlights the substantial amount of time and resource that has been invested in encouraging and equipping staff. The Service by Design programme has developed academics' enthusiasm and confidence, resulting in more vibrant curricula, enriched student experiences, collaborative and contract research and more external engagement. The project appraisal and management project is about providing the necessary skills that enable successful employer engagement projects. The biggest barrier to adoption is initial staff scepticism about its purpose and value. The RoLEx project to redesign the University's programmes has started to liberate staff resources that can be applied to employer engagement, and has also provided many opportunities to engage with employers as curriculum advisors, tutors, providers of projects and placements, and employers of graduates.

Throughout this journey, which still continues, we have been struck by the challenges of institutional inertia and moving staff and processes out of traditional comfort zones. Creating and implementing the University employer engagement strategy is taking longer than initially expected due to factors such as lack of access to sufficient investment, the timescales involved in recruiting key staff and the need to bring staff along so that they willingly and enthusiastically buy in to the whole programme. However, significant progress has been made and approaches such as those described have been instrumental in moving us closer to our goals.

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7. Reorienting marketing to address employer engagement

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Summary

An issue often raised by employers is the lack of visibility and understanding of universities' willingness or capability to engage with employers. Furthermore, employers often do not know what opportunities there may be in universities (HEIs) locally or nationally.

This chapter will look at the development of The Training Gateway as an organisation to facilitate the promotion and marketing of the HE sector's high-quality professional development programmes to business and industry nationally and internationally.

It will address how The Training Gateway has marketed the expertise of the UK both nationally and internationally and developed training and education programmes to support staff within the HE sector to respond better to new opportunities.

The range of different marketing approaches by universities will also be reviewed.

For the purposes of this chapter the terms 'employer engagement' and 'services to business' are deemed to refer to all the activities and services that an institution can deliver to external organisations, including public, private and voluntary sector, and to individuals not in full-time education. This will include professional training, internships, access to facilities, contract research, technology transfer and other knowledge transfer activities.

Introduction

Universities have a key role to play in helping the UK emerge from the recession and reposition itself for the future through upskilling both the future and existing workforce.

The UK has positioned itself to become a knowledge-based economy ranked eight or higher in the OECD. In order to achieve this, it is essential that the existing and future workforce has the capacity and capability to support the challenging agenda. The emphasis on developing high value-added sectors and knowledge-based industries reiterates the need for a highly skilled workforce, able to work in specialist jobs.

In the UK, businesses, especially small to medium-sized, have limited relationships with universities in comparison to those in the US and other economies.

Furthermore, according to data from English universities through their HEIF returns, few small businesses fund their staff to upskill at universities. Whether this is because of the lack of transparency and clarity of current funding systems, or a lack of understanding by the public and private sector as to what universities can provide, is debatable.

What is certain, however, is that there is a clear lack of awareness as to the vast range of business-focused training and education that the HE sector can provide.

With employers working hard to create a culture of training within their organisations (CBI, 2009) and over 43% of businesses stating that investing in skills has improved their profitability and productivity, universities need to ensure they are well placed to capture a significant proportion of the available training market.

Furthermore over 57% of employers have said they are worried about a lack of highly skilled people to fill positions in the future, and it is this market of specialised skills development that universities are ideally placed to support.

Universities are very aware of the need to promote and professionalise their offer to business and have developed a number of innovative approaches to marketing their corporate and executive training portfolios.

This chapter will review how different universities have developed marketing approaches to capture the local, national and international market.

An overview of the current status of marketing employer engagement across higher education

In a survey of 32 higher education institutions across the UK, 100% of those who responded (31) said they actively promoted their offering to business locally. Of those, 71% said they also engaged in promotion to both national and international audiences.

The majority of institutions (60%) said they did have a specific marketing strategy for employer engagement, but that many activities were undertaken as and when needed in partnership with faculties and departments across the institution. The strategies developed

tended to focus on how the marketing was undertaken, where areas of responsibility lay and the general procedures that needed to be followed, rather than a proactive campaign with specific events and activities adopted and undertaken across the institution.

The most common approach (70%) to marketing was to have a centralised marketing department that works in partnership with individual departments to develop materials and support the institution's employer engagement activities. Around 20% of institutions surveyed did not have a marketing department involved in this activity, but did rely on another central service department to provide this type of support.

The most common form of marketing approach was the development of specifically tailored brochures to promote the institution's employer engagement activities. Other commonly used approaches included holding special events including roadshows, seminars and networking events (93%), participating in external business networks (88%) and attending national and international conferences and shows aimed at businesses rather than student recruitment (85%).

Other regular activities included emails and direct mailing of existing contacts and a range of advertising activities.

Interestingly, only around 31% of institutions are using blogs and other social networking sites to promote their employer engagement activities.

The least common marketing activities included advertising in international trade journals and telemarketing, with less than 12% of those surveyed using these approaches.

Promoting the HE sector: The Training Gateway

The Training Gateway will be used as an example of marketing the whole of the HE sector to a local, national and international audience, with an emphasis on the executive and professional training (CPD) capability within the sector.

Prior to 2008, there was no dedicated process or organisation for promoting and marketing the HE sector's high-quality CPD to business and industry nationally and internationally, and yet the sector was undertaking over £400 million of business in this area (HEFCE, 2007).

In addition to the 3.5 million learner days on award-bearing continuing professional development (CPD) or continuing education (CE) in 2005–06 (HEFCE, 2007), a significant amount of CPD is developed through award-bearing programmes for professionals (including professional development Masters programmes, work-based learning and joint awards with professional bodies).

The Training Gateway was established to provide a single portal through which any organisation across the world could make contact with the UK HE sector to procure high-quality education and training to meet the organisation's needs.

Secondly it aimed to provide a professional network through which to share best practice and to support staff working in CPD development and delivery through the provision of training and education.

Starting from a small network of interested professionals meeting together in mid-2007 to discuss the issues they faced within their own institutions, The Training Gateway very quickly gained members from across the UK.

Promoting The Training Gateway to the HE sector

Raising awareness throughout the sector was a relatively straightforward operation through word of mouth and the use of existing HE networks such as the Universities Association for Lifelong Learning (UALL) and the Association for University Research and Industry Links (AURIL). Although members of these networks were not necessarily CPD managers, it was found that there were good links between UALL and AURIL members and CPD staff across institutions.

By the end of 2007 there were around 300 members from over half of the UK universities and, following a successful HEFCE Strategic Development Fund application, The Training Gateway was launched in July 2008.

Prior to the launch, a web development company and a marketing company were recruited to develop the necessary infrastructure and promotional materials needed.

Development of marketing materials

The key factor for The Training Gateway, when considering what type of brand image to develop, was to bear in mind that we were predominately aiming our marketing at public and private sector organisations, not at the HE sector. The HE sector would be recruited by word of mouth and well-established communication channels.

Therefore it was decided that both the design of the website and the branding and marketing materials needed to appeal to our customers and clients, rather than our members.

Under the guidance of a small management board with representatives from a range of different type of institutions the various design ideas were discussed.

Developing both the name and the strapline involved a significant amount of time, since opinions were divided as to what terms should be used and how academic and higher education specific the wording should be.

Eventually, the name 'The Training Gateway' was decided upon and the website and marketing materials developed. In part due to limited budgets, but also since most people do not read vast amounts of promotional literature, we developed a postcard and a single A4 flyer to promote the services of The Training Gateway. Both were designed to give a very clear overview of the services and to direct potential clients to the website, which would be our primary means of communication.

Promotional activities

Following the development of the marketing materials The Training Gateway board developed a marketing plan to promote The Training Gateway to our core client base.

Recognising that it was impossible for an organisation with one member of staff to make direct contact with companies and public sector organisations, we decided to make use of a number of business intermediaries and other PR opportunities to raise the profile of The Training Gateway.

International promotion and marketing

The Training Gateway undertakes a number of activities on behalf of its members to promote the HE sector as a provider of corporate and vocational training to international clients.

Many of these activities have been made possible through the support of UK Trade & Investment's Education and Skills Sector Team and its well-established network and relationships with commercial officers in Embassies and High Commissions worldwide. The commercial officers have been very proactive in promoting The Training Gateway resource within their regions and in a number of cases The Training Gateway has received direct leads to follow up either in-country or in the UK.

The Training Gateway has also taken advantage of commercial officers in-country plans, which provide opportunities for The Training Gateway members to present and engage with international customers by hosting inward delegations and participating in outward missions, exhibitions and scoping visits.

The Training Gateway is also promoting the portfolios of universities at international exhibitions. For a small fee, members can have a case study or a promotional flyer exhibited by The Training Gateway at various events and conferences. Participating members also get a list of all visitors to The Training Gateway stand and can follow up these contacts at a later date with more information about their own institution's business offer.

Bearing in mind the findings that a small proportion of universities surveyed (30%) proactively market their employer engagement offer overseas, this cost-effective approach has proved very popular with members wishing to increase their corporate and public sector contacts without necessarily incurring the usual high costs involved in this sort of marketing activity.

National promotion and marketing

Surprisingly, promoting The Training Gateway to UK companies has proved more difficult than to international clients since there is a less well-defined method of approach for UK companies to find out about the training services of the UK.

For international clients the most common mode of approach is through the embassies and consulates who refer clients directly to organisations like The Training Gateway. However, in the UK it is not as straightforward. There are a wide range of business support organisations in the UK, all of whom have a slightly different remit and mode of engagement.

The Training Gateway has endeavoured to engage with a wide range of these organisations including the CBI, Business Link, Federation of Small Business, Institute of Directors, Chambers of Commerce and the Sector Skills Councils, with varying degrees of success.

However, it is felt that engagement with business is best facilitated through such links and over the past year, as The Training Gateway has continued to communicate with these organisations, we have received more and more opportunities to provide information that can be passed on to member companies through newsletters, websites and other PR activities.

The Training Gateway has also exhibited at a number of UK HR and training conferences including CIPD and HR Summit. Member universities were offered, for a small fee, the opportunity to share The Training Gateway stands or send promotional material to be exhibited on the stand. Again this helped offset some of The Training Gateway costs of exhibiting and provided members with a significant number of high-quality contacts with whom they could directly follow up.

Local promotion and marketing

Since The Training Gateway aims to be a national organisation it has relied on individual members and their institutions to promote The Training Gateway locally. We continually encourage members to refer potential clients for whom they don't have suitable CPD and training programmes to The Training Gateway so another potential supplier can be found.

As The Training Gateway is based at the University of York, significant local promotion has been undertaken through a number of local organisations including the Lifelong Learning Network, Chamber of Commerce and Business Link.

Some universities have developed press releases promoting the work of The Training Gateway when they have won business through it. However, in general we have found that universities prefer to promote their own institutions or work within their local network of HE and FE providers when engaging with regional organisations. For this reason The Training Gateway has tended to promote its activities as an additional service for local providers and not to compete with the regional activities being undertaken.

Lessons learned

1. Developing a distinctive brand:
 - needs to be fairly simple;
 - easily reproducible across a wide variety of media, including black and white.
2. Developing a name:
 - does not necessarily include the word university in the name;
 - expresses as far as possible the specific activity offered.
3. Marketing materials:
 - high quality;
 - not too bulky – we found postcards the best option;
 - information concise and to the point;
 - need to appeal to business, not academia.
4. PR:
 - use all routes possible;
 - focus on the customer;
 - always push for a discount on any chargeable PR.

Using Lifelong Learning Networks and university associations to market employer engagement

Over the past decade universities have developed a wide range of innovative approaches to engaging with external partners and have developed new marketing approaches to facilitate this activity. In many instances Lifelong Learning Networks and university associations have supported their partner institutions by promoting the range of opportunities afforded by the partners to external organisations.

Higher York, the Lifelong Learning Network for the two HE and two FE institutions in the city of York, has developed a range of activities to draw together the offering to business of the four partners. Recognising the distinct offer from each of the institutions but also understanding that local businesses and other organisations do not necessarily care who provides them with the service they require, Higher York has developed a specific brand to promote the partners' portfolio of services.

The most advanced activity is around the skills and training offer for business, and Higher York has developed a centralised database of all the training available from the partners. Working through Business Link, the local Chamber of Commerce and other business intermediaries in the region, the total skills and training offer can be promoted to potential clients without the need for providing contact information about all four partners.

Clarifying the offer to business and providing a single point of contact for both businesses and business intermediaries has significantly helped enhance the reputation of the partners, who are now seen as a co-ordinated unit. It has also helped increase business to the partners through a more effective cross-referral and business-focused approach.

The key factors that have contributed to the success of this type of approach have been:

- identifying a champion and single point of contact within each of the institutions;
- developing the understanding between the partners that by jointly promoting and marketing our offer we will encourage more business;
- the ability of Higher York to act as an honest broker to secure business for the group of partners;
- the development of a comprehensive marketing strategy that allowed both Higher York and the individual institutions to promote their business services;
- sufficient support from senior management in all institutions;
- funding to develop the materials and provide staff resources to oversee and manage the activity.

The North West University Association has also developed a very successful approach to promoting the business-related services of their members. They have developed a unique database called 'Discover HE'. This resource offers a free, easy-to-use and powerful tool for discovering the wealth of higher education provision in the North-West. It brings together more than 8,000 courses from 15 higher education institutions and 29 further education colleges in the region. It offers a starting point to explore provision for industry sectors from various providers in one single place.

Innovative approaches from individual institutions

As was found in the survey the majority, if not all HEIs, actively promote their employer engagement offer to external partners and clients. The following section details a number of innovative approaches undertaken by a range of different institutions.

Engaging employers to support undergraduate students and graduate employment: the University of Bournemouth

With a background in working in the retail sector, David Kilburn, Head of the School of Services Management at the University of Bournemouth, has developed an innovative way of engaging with business.

Using contacts in the large retail companies across the UK including Tesco, Waitrose, B&Q and ASDA, the University of Bournemouth identifies a number of key business problems faced by these organisations. The business problems are then presented to final-year students as six-month consultancy projects. Working in groups of five or six on separate business problems, the 40 or so students present their findings to the companies and complete a 12,000-word report detailing their solutions to the issue.

As well as improving the graduate employment rate for students participating in this activity to 100%, the University has also won staff fellowships worth over £20,000, a sponsored academic post of £80,000 and a number of consultancy and applied research projects.

Using partnerships to enhance employer engagement: the University of Birmingham

The University of Birmingham Business Development Unit has worked with a number of organisations, including business intermediaries, to promote its services for business and thus enhance and increase its relationships with external organisations.

Working with the University of Warwick to develop a 'Science City' has resulted in over £80 million of infrastructure funding to the universities involved to enhance the research base. Building on the Science City brand and the increased research capability, the University of Birmingham has developed collaborations with local, regional, national and international businesses.

Locally they have worked with business intermediaries including the local Chamber of Commerce, the Manufacturing Advisory Service and professional associations through joint events aimed at specific sectors or business groups. This has built on the existing links and networks of these organisations and allowed the University to promote a wide range of portfolios to businesses.

Other results of this activity have been a great awareness locally and nationally of the research capacity of the institution and an increase in collaborations with national and international businesses.

Another innovative approach that the University has taken is their Birmingham Heroes campaign, which raises the profiles of academics whose work has had a significant impact on society across a range of sectors. By humanising the face of academia, the University hopes that the impact and relevance of higher education will become more apparent to both the general public and business.

The University, which plans to launch this campaign in early 2010, plans to use a full range of marketing and PR approaches to promote their expertise including poster boards, national advertising and a range of events across the UK.

Development of a sector specific approach to marketing: Birmingham City University

Using staff with a strong background in marketing, Birmingham City University (BCU) began a strategic approach to marketing their portfolio of expertise. Having assessed what the University was promoting to various sectors and identifying internal capability, capacity and expertise available within the institution across a range of key sectors, they began to develop a range of different engagement approaches for different sectors.

The initial development was the establishment of an arts knowledge network,

which has resulted in an annual arts festival that brings together all the various arts-related expertise across the University and provides a very effective way of promoting this expertise to external organisations.

BCU are taking a similar approach in the digital sector and are bringing together inter-departmental expertise in this area to provide a comprehensive portfolio through which to engage external organisations.

In the design sector a different approach was taken and a partnership was initially developed with UBM Live. Over time this has led to further developments and partnerships with businesses who provide input into curriculum design and development. More recently BCU has received over 63 enquiries about potential Knowledge Transfer Partnerships and is developing a wide range of research partnerships.

This new strategic approach has meant that BCU has begun to look at all its products within the context of different market sectors, as well as regional and national agendas. This has resulted in a better understanding by business of what the University has to offer and the positive impact it will have, leading consequently to partnerships that have a more diverse and greater value to the University.

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8. Effective models of employer engagement

Laura Dean and Sally Brown
Leeds Metropolitan University

Employer engagement is sometimes seen as a panacea to all the challenges facing higher education. It is offered as a solution to many university agendas, including promoting student employability, fostering enterprise and entrepreneurialism and promoting innovation and knowledge transfer. It has also been seen as a solution to national issues; for example, in the Leitch Review of Skills (2006). The review's focus, on higher education delivering workforce development in relation to high-level skills, points to increasing interaction between employers and academia. Employer engagement has the potential to supply many more benefits for both parties: it can support work-related learning, internships and career management skills development, leading to the increased levels of graduate employability and preparation for employment the Government currently requests of higher education (e.g. in DIUS, 2008). It can support employers in developing their employees, recruiting effectively, creating new and innovative systems, processes and in transferring knowledge from the academic arena to the practical, and vice versa.

For universities engaging with employers, and for employers engaging with higher education, it can be draining in terms of time, money or brand name investment, if inappropriate partnerships are entered into or if the relationships are badly managed. For all the potential benefits to both parties of working together, many initial interactions become untenable as the costs to one party become too great or the benefits are perceived as insufficient or even unclear. Successful joint activities have real and tangible rewards for both parties. In this chapter we will consider six new models for engaging employers and analyse their success, using illustrative case studies.

Leeds Met has had a long standing interest in working collaboratively with employers, being among the first to trial foundation degrees and involving employers

in courses at all stages: from design to delivery, assessment to evaluation. In 2009 the Employability Office undertook a short investigation into methods of engagement across the sector, and gathered case studies about a range of innovative interactions, presented here as six main models.

What issues face employers?

Current economic circumstances can disincline employers from engaging with education institutions: since they could view it as potentially draining of time and money (Wedgwood, 2008). The very fact that 2009 saw a third of recruiters freeze graduate recruitment and 10% make permanent cuts in numbers of graduates (CBI, 2009) means that some of the traditional reasons employers engage, i.e. to access employable graduates, have been reduced. Additionally the new UK Government-promoted curriculum for 14–19-year-olds places an increased emphasis on work experience, and the increasing demands to justify quality work experience (e.g. via the NCWE quality mark, endorsed by the Department for Business, innovation and Skills) mean employers may experience a saturation of requests to offer work experience sooner or later. These factors can also make employers less responsive to sponsorship requests, along with traditional requests to contribute to buildings, grants, or other resources. However, employers do continue to want to engage with higher education for reasons including a desire for opportunities for: knowledge transfer, recruitment, potential, staff development, brand development and organisational promotion. UK higher education institutions collectively cater for 2.3 million students (HESA, 2009), who are all also potential employees, partners or customers. UK higher education also has the potential to support the training needs of business more cost effectively than the private sector can, as it is able to draw to some extent on public funds, for example in the case of foundation degrees.

The grid below highlights some of the issues affecting an interaction that can impact whether a particular engagement strategy will be successful.

Table 8.1

	Employer	Higher education institution (HEI)
Resource type	Supplying staff time, expertise or experience can be done at little or no cost to the employer, as less busy periods are used and multiple benefits can be derived from a single action ² .	Receiving payments or donations in cash, or even on occasions in kind, can mean matched funding can be used, which can be more valuable.
Providing access to students	Students are potential consumers and employees, so working with universities can provide low-cost marketing opportunities.	Supplying access to students can raise ethical, practical and physical issues.
Direction of stated benefit	Traditionally employer engagement has been seen as employers providing resources: jobs for graduates; placement opportunities for students; or bequests or other financial support.	Increasingly HEIs are acting as businesses, offering consultancy, training needs analysis and staff development for employers.
Perceptions of benefits	Employers can benefit in terms of corporate social responsibility by being seen as benefactors.	HEIs brands can be damaged by perceptions of opaque benefits for the employer, for example Reg Vardy's sponsorship of City Academies has led to a backlash against both his business and the education institutions.

Designing programmes in conjunction with employers

A now well-established method of employer engagement is via foundation degrees. The University of Huddersfield's work with the Royal Mail Group or Leeds Metropolitan University's interactions with Her Majesty's Prison Service are cases in point. Both HEIs undertook training needs analyses, and worked within the employers' own structures to develop effective foundation degrees that have been successful in upskilling the workforce, generating student numbers and revenue for the HEIs and meeting the

2 For example, employees may benefit from skills development in being involved in mentoring students; actions that take no greater period of time than traditional staff development activities would.

training needs of the employers. While foundation degrees provide examples of good practice, showing benefits for both parties, they are not necessarily transferable to all employers, or all university courses. However, while the course structure of foundation degrees may not work for all programmes, the model of co-designing courses with employers is transferable.

At Leeds Met our Centre for Public Relations Studies team within the Business School are working closely with the National Health Service to improve the capabilities of their senior professional communicators. They are developing a ground-breaking, co-designed, part-time Masters degree programme with content and delivery negotiated to match exactly the needs of the employees concerned and the employing organisation, while maintaining the highest Masters-level standards. The programme is being developed iteratively, with formative inputs from the course participants, their CEOs and Department of Health policy initiatives, resulting in fine-tuned course curriculum and pedagogic approaches.

— Case study from Leeds Metropolitan University,
supplied by Anne Gregory

Engaging employers in the curriculum

While many institutions use employers to contribute to curriculum design, and provide one-off teaching sessions for students, it is possible to make their contribution more direct and integral. Leeds Metropolitan University have an innovative module run and assessed by employers.

On the level two Media Professionals module on the BA (Hons) Media and Popular Culture, employers are engaged initially to help design the programme and then employed as mentors to run simulated work experience placements, assessing the work as they would in the workplace. For example, one employer, a BBC documentary maker, sets his student group a project to

develop a short documentary within the BBC guidelines and framework, in the style of an existing documentary series. This allows students to experience the benefits of work experience, which they would find difficult to access otherwise in this competitive industry. The module has credibility with students, allows them to develop employability skills such as teamwork, communication and problem solving, while also building a network. The employers benefit, as they are paid for their time, have the opportunity to engage with potential future employees and to provide a practical input to what is otherwise a theory-based element of a course.

— Case study from Leeds Metropolitan University,
supplied by Laura Dean

The University of Bradford operates a similar model for their Masters-level Approved Mental Health Professional course. Employers are intrinsically involved in all aspects of the programme, course design, delivery and then assessment. They deliver practice workshops, assess the portfolio and placement activity and are members of the Programme Board. One key difference between these cases is that the University of Bradford also engage with the wider community, for example in allowing service users to contribute to assessment of portfolios. There is a commitment to include service users and carers in the teaching of each module so the students can reflect upon the impact of their work. For pragmatic reasons, as well as in the interests of equity, service users and carers are paid the standard rate for teaching and a flat fee for attending meetings.

— Case study from the University of Bradford, supplied
by Vicki Illingsworth

In such models it is possible to see the benefits to both parties and so the potential for longevity of the interaction. However, with multiple stakeholders (the university, students, employers, and in Bradford's case service users) there can be

tensions between the different agendas and sometimes contradicting needs. In addition, in this type of model there can be tensions between practical and academic aspects, which can be particularly visible on higher-level programmes that need to maintain academic rigour while acknowledging the importance of authentic practice.

Targeting different employers and 'making luck'

Traditionally employers working with HEIs have come from national organisations in the private sector, or larger branches of the public sector such as the NHS or Teacher Training. While a significant minority of people work for these types of organisations, many more work for the combined pool of small and medium-sized enterprises (SMEs), charities and the voluntary sector, including social enterprises: 60% of all employees work for SMEs (BIS, 2007). Over the last decade there has been massive growth in the voluntary sector with third-sector organisations taking on work traditionally carried out in the private sector, such as consultancy. While interacting with SMEs can be more time-intensive for HEIs, they currently work with HEIs to an extent which is wholly disproportionate relative to larger organisations (King, 2007). Additionally there are already often many inroads to SME and third-sector employers: students may work for them, and alumni certainly will. The principle of 'making luck' developed by Wiseman is useful here (e.g. Smith *et al.*, 1996; Wiseman, 2003). Wiseman's work has shown that people who are widely regarded as being 'lucky' are in fact just adept at spotting opportunities, maintain wide networks and, most importantly, take chances and vary routines. The principle applies in the same way to HEIs: universities house thousands of staff, each with their own personal networks and contacts. Between them they see opportunities for innovative interactions regularly, but often it is not in their individual interests to pursue them and so the organisation does not reap the benefits. Universities need to be smarter at harnessing these opportunities and incentivising employees to pass on their employer contacts.

Staff who are externally facing may have greater potential to spot opportunities. However, it is important to create a culture in which all staff see a role for themselves in facilitating engagement.

Careers Advisers have contact with many employers, although in most services their stated job role is principally to use these contacts to update their labour market knowledge, and advise

students about those organisations. This means they are well placed to make use of chance encounters. For example, a careers adviser was contacted by an SME employer wanting to advertise a vacancy. She followed up with the employer, building a relationship over time, which led to the employer providing mock interviews for students, allowing the observation of assessment centres and allowing students to visit their premises.

— Case study from Leeds Metropolitan University,
supplied by Sue Butler

Employees of HEIs are continually meeting with employers in a work capacity and in other arenas. If they are encouraged, so that staff see themselves as ambassadors and market makers for the university, these contacts can be tapped productively for both parties.

An employee of the University of Leeds was a school governor at a local high school. In this role she met up with another governor, who worked for the civil service. The employee, with permission, passed information on this contact to academic staff in the Sociology department, who are currently in the process of organising a series of talks and activities for their students by this employer.

— Case study from the University of Leeds, supplied by
Marah Gardner

There are benefits from tapping the multitude of networks available within your organisation, and using existing contacts effectively can make interaction more rapid and efficient. Having access to wide networks can bring other benefits; for example, when making funding bids, having partners with whom you are ready to bid is distinctly beneficial. Nevertheless, there are potential disadvantages in allowing all staff to represent the HEI to employers. It can mean that multiple contacts are made with one organisation, which can be frustrating for both employers and universities. However, it is possible to build a culture in which information is passed to the most relevant areas within the HEI for use, if employees feel that they are working for the university as a whole, not for a

specific localised area. For example, a number of universities use programmes such as 'Razor's Edge' to manage contacts through a database to which staff members throughout the institution can contribute. An exploration of the logistics of catalysing culture change are outside the scope of this chapter, but is an area of live interest in the community of learning around employer engagement that would merit further study.

Engaging with employers in the workplace

Many students currently work, either full- or part-time, in addition to their studies, and work-related learning is increasing: maximising the on-the-job learning that occurs and linking it back to theory learned at the university. Work-related learning can be offered in the optional and traditional sandwich placement format, or, as in foundation degrees, fully within the course. In a survey undertaken at Leeds Met we found widespread use of work-related learning projects: collaborations that provided benefits for employers and students. These included long-established, substantial work-related learning modules, such as those run by Leeds Metropolitan University in its language suite of programmes, in which students undertake projects for local, national or international employers while gaining academic credits. However, they also included examples where employers worked at the small or micro level: with independent artists, for example.

The University of Bedfordshire runs work-related learning modules in a range of faculties; for example, Marketing and PR students undertake final-year projects in groups, in which they act as consultants to local businesses. In some areas this involves SMEs and sole traders; for example, Media and PR students have over the last two years been involved with promoting, developing and running an arts festival (B-Fest) in which they showcase their own work alongside professionals and external artists. Students benefit from exposure to authentic working environments, pressures, deadlines and practices. Employers benefit from the advanced access to potential recruits and the completion of projects.

— Case study from the University of Bedfordshire,
supplied by Mark Atlay

Once established this model provides benefits for all parties, and in every case identified in this study, this approach had led to repeat requests for involvement by the employers concerned and growth year-on-year in terms of numbers of employers and students involved. In many cases, actual or intended expansion to greater curriculum areas was also present. However, most HEIs had found challenges in persuading both the employers and the staff and students of the benefits to be reaped and had started this approach on a pilot basis in order to demonstrate its success in their specific institution. In situations where employers have reached work experience saturation levels, this has made it particularly difficult to get such initiatives established, and having dedicated individuals committed to make the case to employers has been vital to success.

Engaging with employers' agendas: corporate social responsibility

In this model, HEIs act in conjunction with two other parties: the employer and a third-party beneficiary. Mirroring in many ways the Knowledge Transfer Partnership model, students are engaged in activities with a third party for the mutual benefit of all three. For example, an HEI might develop an initiative with a law firm in which students and staff from both institutions might perform pro bono work for a charitable organisation. In the case of Northumbria University, a network of employers are involved with Law students who have for many years been running a legal clinic to offer services to small businesses. The students are supported by staff at two local law firms. Students benefit from the work experience and the opportunity to work alongside professionals; the law firm benefits from the positive publicity, access to the students and the staff development opportunities offered from working with new client groups; and the small businesses benefit from free legal advice. This model could potentially be highly beneficial in international co-operative arrangements. While international volunteering has at times been viewed critically as putting extra pressure on the indigenous populations, this system would provide long-term solutions and focus on resolving administrative issues, rather than focusing directly on people, who can potentially be harmed by short-term interventions. In our survey no case studies emerged of this approach, but it is a concept that needs further development and exploration.

Using alumni and employer–students

Every year HEIs produce thousands of graduates each, who, within several years, may become employers themselves. In addition, with increasing numbers of mature and work-based learning students, current students are also employers. Alumni offices tend to focus on raising donations from these contacts, rather than promoting a range of collaborative arrangements including fostering employer engagement. Maintaining contact with alumni can produce useful contacts for all kinds of purposes. A potential mechanism for doing this is via networking tools, Nings or e-portfolios. If tools used for education purposes remained accessible after graduation, there is the potential for employers and students to interact in a way that does not use staff time. Allowing their use across a range of similar or complementary programmes also allows for cross-fertilisation of ideas and development of projects between students and employers in those disciplines.

At Leeds Metropolitan University an e-portfolio style tool, developed to support learning and networking within student cohorts, was made available to alumni as well as current students. As the tool fulfilled the needs of the students and graduates to showcase their work, collaborate and learn from each other, the tool continued to be used by alumni. The tool has recently been rolled out across all the courses in the faculty in which it is based, allowing further collaboration. The device has led to many interactions between the alumni–employers and students and requires little input from staff in this area. For example, students can use this portal to showcase their work to alumni, for feedback and as a networking opportunity. Alumni can post requests for support in particular projects, e.g. work experience opportunities.

— Case study from Leeds Metropolitan University,
supplied by Laura Dean

Conclusion

With the current focus on employability, employer engagement and higher-levels skills, more models of collaboration are currently emerging. The variety of HEIs and businesses mean that there is great scope for the creativity of the people on both sides. Changes in Government focus that may unintentionally militate against co-operative working, may reduce some of the initiatives taking place, and employers make a “plea for a joined up policy and simplification of administration” (Wedgwood, 2008, p. 6). Working together is about the long-term relationships though and isn’t something that can be effectively undertaken if it is viewed as a short-term solution to fit in with current needs. The universities reviewed in this chapter are continuing to investigate effective models for working with employers: it is our intention that this work will build on ideas outlined here and continue to stimulate creative solutions to prompt productive interactions between education systems and businesses in the UK and internationally.

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