processfix

Welcome

Education is experiencing a period of significant change. Changes in student and parent expectations, funding, technology and in pedagogic approaches, to name but a few. Those institutions, both in higher education and earlier, which hunker down behind existing structures and processes, making only minor tweaks, may not emerge from this period 'fit for purpose'.

In this edition of the Processfix newsletter, Fraser Keir, Academic Registrar at Birkbeck, University of London, explains how they are undertaking a comprehensive review of the student experience, identifying what they need to deliver in a competitive marketplace.

And Thomas Anthony gives us an insight into his work as UK Financial Controller of Cognita, the global private schools group. He outlines some of the challenges they face in integrating institutions which arrive with unique cultures and established ways of working.

Finally, in our spotlight, Will Fitzmaurice, Assistant Director, Student Registry at the University of Greenwich, shares with us his thoughts on the importance of communication and consistency in delivering a positive experience for students.

NEWSFLASH!

Leicestershire, UK — June 2018
Market Harborough Building Society enhance leadership training with Processfix
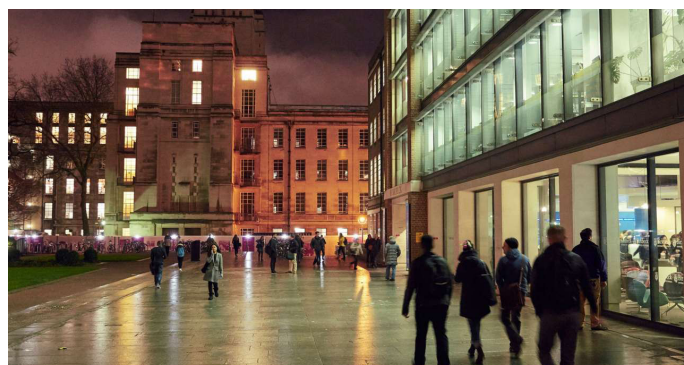

Adapting to the evolving needs of students at Birkbeck

Fraser Keir is the Academic Registrar at Birkbeck, University of London. Birkbeck was created 200 years ago to provide a university education for working Londoners. This widening participation ethos still pervades today, with all 12,000 students, most of whom work in the daytime, still taught exclusively in the evening. This research-intensive institution now also recruits students from all over the world, as well as from its traditional London heartland.

After completing his own undergraduate degree, Fraser stayed on to work in the world of student recruitment. He started his career in Scotland, travelling around there and in North America, promoting higher education to all those who believed in its value. His path then took him to the Open University (OU) where he helped support the introduction of a new fees and funding regime. Being committed to part-time higher education, he also completed his MBA with the OU whilst managing the demands of a challenging role and a young family. Following this, he moved into his current role as Academic Registrar at Birkbeck, where he describes his job as: "Completely living up to expectations. A university registry is traditionally at the heart of developing and operationalising institutional and government policy and the introduction of the Teaching Excellence Framework (TEF) and Office for Students (OfS) means no day is the same. Birkbeck have to continually evolve in a very competitive and unpredictable external environment. We are predominantly a part-time institution, but in response to the external marketplace, we now teach full-time programmes at undergraduate and postgraduate levels, all delivered between 6.00 pm and 9.00 pm each evening. You could describe our full-time portfolio as an accelerated version of our traditional part-time mode of attendance!"

Fraser expanded on the new challenges: "Part-time student numbers have, over the past six years, declined by 60% across the country. Birkbeck and the Open University have really had to work hard to ensure that part-time higher education was not forgotten by policy makers and funding bodies. Mature learners do not conform to the campus-based stereotypes of what an undergraduate student should look like. Part-time students are generally older, already in careers, economically active and often have significant caring responsibilities. Neither do mature students have the advice and guidance networks that schools leavers take for granted, so we have to work even harder to support their transition onto the right programme of study. As we have established, our students are particularly sensitive to changes to the funding environment."

Birkbeck recently achieved a Silver award in the Teaching Excellence Framework (TEF), which recognised their work in attracting and supporting students from diverse backgrounds, mature learners and those who would not otherwise have engaged with higher education. And, with a commitment to enhancing the whole student experience, Fraser explained how they have recently undertaken a comprehensive review of the whole student experience at Birkbeck: "We have a clear set of priorities for enhancing the student experience, from application through to graduation. This includes a greater use of technology to support the demanding lives that our students

> ## "Birkbeck have to continually evolve in a very competitive and unpredictable external environment"

lead and a very ambitious estates development programme to improve our teaching and research infrastructure. Our students like our research-intensive culture, but also the flexibility we offer in our teaching delivery and we also have to recognise that as 70% of our students work in demanding jobs, they are used

Cognita schools work together to standardise processes

As UK Financial Controller of Cognita, the global private schools group, Thomas Anthony works within the School Support Centre, where his remit includes leading the the UK finance functions, covering Financial Accounting, Payroll, Accounts Payable and Revenue Management.

Tom started by telling us a bit about his journey to Cognita: "I've been here since January this year. I was looking to do something fresh and Cognita gave me that. It is a private equity backed group, as opposed to my previous role in a privately owned manufacturing business. I also liked the fact that it has ambitious international expansion plans and whilst run as a business, is run in a way that puts the interest and well-being of its pupils first. The investors have shown their commitment to the business by reinvesting all the profits into improved facilities and quality education."

The central functions are based in the School Support Centre in Milton Keynes. "It is important that we work in partnership with our schools, rather than just sending or receiving instructions. Cognita has grown through acquisitions,

which presents the challenge of integrating schools who come with their own unique culture and ways of doing things. The variety of school sizes can make centralisation efforts more difficult; whilst the larger schools have their own finance teams, our smaller schools might be led by a Business Manager whose role is only partly finance. Skills and time therefore vary a lot and our role at the Support Centre is to engage with all of the schools to train them according to their individual needs, but with a common aim of introducing effective processes."

Processfix were brought in to help Tom and his team improve the group's Accounts Payable process. Tom explained that there was a variety of ways in which schools historically procure services. In some,

teachers might order directly from a supplier, whilst in others, this might be routed through the school finance team. Both create payment issues. "Many suppliers have immediate, 7-day or 14-day payment terms and the schools were being chased for payment but didn't understand why the Support Centre was unable to meet these terms. We quickly realised that it was important not to assume the schools had a full understanding of the process steps and requirements. Instead, we needed to listen to their needs and concerns and work together to design and agree a practical process. As a two-way discussion, it was easier to achieve the right ownership and cooperation."

"As a two-way discussion, it was easier to achieve the right ownership and cooperation"

"One of our long running challenges was the time it took for purchase invoices to get from the schools to the Support Centre. Too many invoices were getting paid late as a result. It was easy to demonstrate that an effective solution required removing the bottlenecks and obstacles from A to B."

At the Processfix workshop, the number of steps from receipt of invoice to payment was highlighted and it was possible to see how many were actually redundant. "We were able to demonstrate to the schools that when purchase orders are raised and approved prior to placing the order with the supplier, the subsequent invoices could be processed and paid much more quickly. We made further improvements by standardising the purchase order process for all types of spend and getting suppliers to send soft copies of all invoices direct to the Support Centre. The result was that many existing process steps became redundant, including many printing, filing and scanning activities at the schools and Support Centre."

Tom went on to say how valuable the workshop had been for the schools and the Support Centre: "We were lucky to have two school Business Managers attending (given that it was the Easter holidays!), plus one secondee currently in school from our commercial arm. The school reps found a lot more complexity than they expected and the Support Centre reps in turn now have a much better appreciation of the practical challenges of school procurement. We learnt that day-to-day, you can never know what is going to happen and, of course, that the welfare and education of the pupils always comes first."

We asked Tom how he saw the future in process terms. "There's a clear need for a standardised process, but success relies on effective communication and training the right people. This can only be achieved when the School Support Centre and individual school finance teams work together as a single team. Those school finance teams also need to work with the teachers, recognising the time limitations of the teaching calendar. And it is working, slowly but surely. From the Schools Support Centre, we can provide the materials and show them how the process should work step-by-step, from negotiating commercial engagement terms, raising requisitions and purchase orders, through to making payments on time. We also have to recognise a unique feature of working with schools: there may be time periods during school holidays where the office is not manned. We can overcome this issue by invoices going direct to the Support Centre; there'll be no delay if the process has been followed from the start!"

If you're interested in speaking to Tom about any of the above, please contact him via email: thomas.anthony@cognita.com

Continued from page 1

to high standards of support and infrastructure. Students are also coming to see us having already completed a full day of work; our teaching rooms and layout can help significantly to influence their ability to learn at a time of day when they are not always feeling so fresh."

As well as the student experience once they are at Birkbeck, the team are looking at the enrolment and admissions processes, to meet their target of delivering a positive experience right from the moment of application.

"To do this, we decided to undertake a rigorous review of the evidence and challenge what we did. We enrol about 12,000 new and continuing students every year and whilst our completely online enrolment process was already pretty slick, taking on average about five days to complete from start to finish, we knew that we could reduce the time it takes to turn around applications further. Following this review, we engaged with Processfix to carry out two workshops. During these we made significant

progress in reducing the turnaround time it will take to get an application processed through to offer stage. We also anticipate that, as a result of the Processfix workshops, there are opportunities to reduce the time it takes to enrol even further; all important initiatives in the competitive market we operate in."

If you're interested in speaking to Fraser Keir about any of the above, please contact him via email: f.keir@bbk.ac.uk

In the spotlight:
Will Fitzmaurice, Assistant Director, Student Registry, University of Greenwich

Will moved to Greenwich in 2016, following a career as a faculty member at Kings College, London. He undertook training whilst at Kings to become a Processfix facilitator, enhancing his ability to lead and drive process improvements internally. He brought that experience, along with the knowledge of how a full Processfix workshop can support organisational improvements, to Greenwich, where workshops have recently been held on the registration and admissions processes.

As a trained facilitator yourself, why bring in the Processfix team?

There are two key reasons why Processfix is my 'go to' approach if I know of an area that needs attention and change. Firstly, it helps to depersonalise any sensitivities or issues and secondly, it uses tools which have been proven by academic research; always helpful if persuasion is required to encourage academic colleagues to participate!

There are also several challenges to 'in-house' facilitation. One is that if

even when you are trained up, typically it's not your day job; another is that if you're involved in a process, you are not able to be a neutral facilitator, as your opinion is likely to come with you. That's why we asked Processfix to come in to support us with an independent workshop. I was supported in this by our new Director of Student & Academic Services, Chris Shelley. Chris had experienced the positive impact of a Processfix workshop in a previous role and I'm extremely grateful that he found the resources and made this initiative a priority for Greenwich.

What were you trying to achieve?

When we looked at the admissions process, we knew that our first step was to understand what the whole process was. No one individual had full oversight of the process as it had evolved so much over time. In addition, whilst we were one of the first universities to deliver an online application form, it needed a refresh and we wanted to understand some of the blockages that were occurring in the process.

> ## "No one individual had full oversight of the process as it had evolved so much over time"

The key progress that we made was in reducing the number of steps in the admissions process from 74 to 38. The full, refreshed process will first be experienced by applicants in September 2019, but there are several changes that we will bring in sooner than that. For example, a brief has already been given to the IT team for some of the simpler tweaks to our systems to fit with the new process.

What key changes are necessary to achieve your goals?

A key change is around communication. For example, whilst a direct applicant would

> ## "The key progress that we made was in reducing the number of steps in the admissions process from 74 to 38"

receive an email saying 'thank you' for their application, they received no further information regarding timelines and when to expect a response. As a result, they would sometimes call the next day, only to be told nothing would happen for a while; this also put a burden on our staff in terms of having to deal with such enquiries. So, setting expectations for applicants, being clear on what will happen and when, is important. This issue may not have come up had it not been for the workshop, as we may never had had the right people in the room to agree what should happen, who should execute it and by when.

Another change that came out of the workshop was the need to review the overall layout of the online application form and the questions we are asking. We need to make sure that our website is as current and functional as all the other websites the students are used to accessing.

And finally, we will be bringing more consistency to the whole process, so that whatever the application, a student will receive the same service as their peers. As long as it is working well, a student will not know any different. But when there are issues, there is frustration, which can impact our staff, as well as our reputation.

And the next steps?

Following the workshop, there was a real buzz and people definitely had a positive experience, but inevitably, once you get back into the real world, other issues can take over. Our follow-up meeting with Processfix is not until 2020, as the full project won't go live until September 2019. In the meantime, it's down to me, as the process champion, to keep it on the agenda, to maintain communication about progress and to be a positive reminder of what needs to happen next.

If you're interested in speaking to Will about any of the above, please contact him via email: w.fitzmaurice@greenwich.ac.uk

About us

Organisations rely on processes to get things done. Often these simply evolve over time and become inefficient ways of working. Processfix bring powerful, proven and behaviour–changing techniques to bear in a professionally facilitated environment.
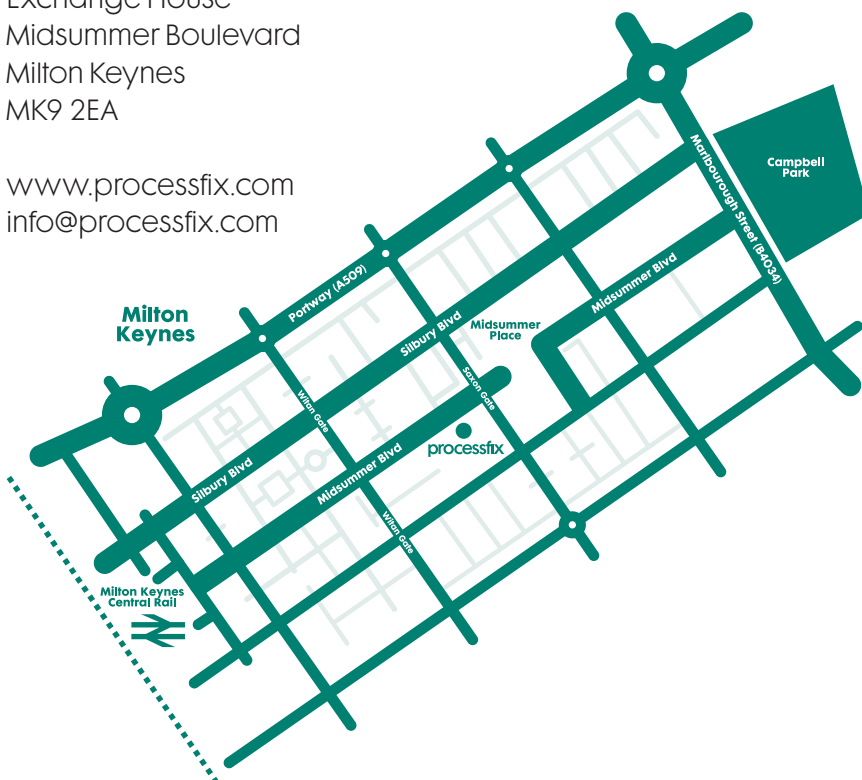
We focus on engaging your teams in their own improvement, empowering them to re–evaluate the way they do things and to develop new and improved ways of working that transform performance and deliver immediate results.

Whether you require Rapid Improvement Workshop facilitation, training, project leadership or an organisational wide process improvement programme. Processfix specialise in facilitating your team, delivering immediate benefits and instilling continuous improvement across your organisation.

And Finally…

Jaguar Land Rover use Processfix as catalyst for change.

LAND–ROVER

To: jules.cross@processfix.com

Dear Jules,

Just wanted to personally thank your team for our recent Processfix workshop. I enjoyed the experience and I think the end result is some ambitious ideas to change processes in the governance area and a group of people who will always look now for the value that processes, templates and reports are generating. Thanks for your energy and style which helped to steer us towards the end point for the 3 days.

Best wishes,
Karen Stables
Head of PMO
Jaguar Land Rover

If you would like to find out how Processfix can benefit your organisation, please contact us at:

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