

**Making connections across professional boundaries and the successful development of the portfolio of courses offered by a University. (0070)**

**Theme** Management, leadership, governance and quality

**Abstract 150 words**

Many universities are taking a more strategic and market-informed approach to managing their course portfolios, including the development of new courses. These changes are being driven by changes not just in HE funding but also in society's expectations of the purposes and outcomes of higher education.

Portfolio management is a political arena and there are tensions between the notions of academic freedom and institutional efficiency. A project funded by HEFCE's Leadership, Governance and Management fund in 2010/11 has explored these issues and its findings relate not just to the processes of portfolio development but also to issues of culture, leadership and governance in higher education. Recommendations are made about how staff can be enabled to work across professional boundaries and examples are given as to how academics and professional support staff (in finance, marketing, quality etc) can be enabled to take a more collaborative and successful approach to working together.

**Outline 919 words**

A project funded by HEFCE's Leadership, Governance and Management fund in 2010/11 explored how universities in the UK are managing their course portfolios, developing new courses and closing older ones. The project was led by the University for the Creative Arts, working with Leeds University and the University of West of England. Nine other UK universities were associate partners in the project which examined case study material in each of the twelve institutions.

The project was conducted against a background of more UK universities beginning to take a more strategic and market-informed approach to managing their course portfolios, including the development of new courses. There is a growing consensus that new programme development and associated portfolio management is a critical issue as student recruitment is central to the financial health of institutions. However, there are concerns about whether all subjects within the portfolio of courses are financially sustainable and will continue to receive ongoing support within their host institutions.

The project gathered data for analysis via evaluation of UCAS and HESA datasets so as to establish the rates of successful new course developed achieved by the higher education sector in the UK. Literature searches explored the key themes of a) new product development and b) cultural issues regarding collaboration between academics and professional support staff, and c) the management of change in higher education. A questionnaire was sent to staff at the participating universities to gather views about the key issues in new course development and portfolio management from the perspective of academics and professional support staff. Analysis of the responses was used to establish an agenda for visits to the universities contributing to the project and enable a series of detailed interviews to be conducted with individuals and groups of staff.

A summary of interim findings was prepared based on the data analyses, literature searches and interviews. The findings were then validated through further discussion with the participating universities. The project's findings relate not just to the processes of portfolio development but also to issues of culture, leadership and governance in higher education.

The project found that universities have developed a range of performance indicators by which they can judge the success of each of their courses. Examples of key financial indicators include recruitment to target, generation of sufficient income, and sufficient margins of costs over income. Importantly measures of success are beginning to focus not just on inputs (e.g. meeting recruitment targets) but also outputs (e.g. employment). The focus on the economic, social and cultural outputs of higher education raises questions as to the purposes and value of higher education. The project recognises the value of being more evidence-based when taking decisions about changes to the portfolio but cautions that there is also a need to guard against being solely data-driven. Caution needs to be exercised in the use of data so that it is not used to make mechanistic decisions but rather used to inform academic, financial and strategic judgements.

The project established that portfolio management is a political arena. Due to the executive leadership/interventions that are required to manage the portfolio there is tension between the notion of academic freedom and institutional efficiency, accountability and responsiveness. The project found that a more collaborative and collective approach, involving managers/leaders, professionals and academics in both course development and portfolio management can beneficially ease this tension. Staff who can span boundaries (academic, marketing, and financial) were found to play an important role. A senior leader, at Pro Vice-Chancellor level or similar, can usefully co-ordinate the work of the academics with the professional support staff. Those university leaders charged with leading this activity need to be able to facilitate/broker/ negotiate decisions and ensure difficult issues are faced and resolved.

There were benefits found when universities viewed new course development as a project and, therefore, adopting project management methodologies. A staged process, with early financial, business and market scrutiny was found to be optimal. There was also value in a central committee or group to oversee proposals for new course development so individual proposals are not considered in isolation but in terms of strategic-fit which brings together the various participants and perspectives (academics, marketing, quality and finance).

For new courses the academic champion/well networked lecturer was widely recognised as a critical success factor. Innovative proposals can come from those academics that are well-networked within their local, national or indeed international business, education or social communities. Being engaged with business (e.g. through consultancy, research and development services) and graduate/alumni/graduate employer feedback was demonstrated as helping to identify future successful courses.

How course failure is dealt with was also found to be a significant issue. Closing a course is often seen as a risk and can create significant additional work in the short term. Having to close a course can have impacts on staff and students. Universities need to think carefully about how to manage stakeholder perceptions including those of staff, students, professional bodies and the media and this is an increasingly important part of the course rationalisation process.

Whilst the projects findings are grounded in reflections on the processes of portfolio development and the purposes of higher education, of equal importance are its recommendations in relation to culture, leadership and governance in higher education. A number of examples have been documented through the project of the benefits of staff in UK universities working across professional boundaries. Universities leaders are advised to consider the enablers and barriers to staff being able to take a more collaborative and successful approach to working together.