

Procurement of a new Student Administration System



**University of
Sunderland**

Of interest to:

Staff involved in the Procurement and Implementation of Information Systems

Aiming for inclusion

The philosophy behind the project

The procurement process

An outline of the steps taken

Weighing the evidence

Drawing together the elements to make an informed decision

Visit the JISC infoNet website: <http://www.jiscinfonet.ac.uk>

Join the JISC infoNet mailing list: <http://www.jiscmail.ac.uk/lists/jiscinfonet.html>

Procurement of a new Student Administration System

The University of Sunderland completed its process for procuring a new Student Administration System in May 2001. The selection was carried out under the auspices of a Project Team (Project "Plus 2"), which was set up to procure and implement a new Student Administration System, a Virtual Learning Environment and a Managed Learning Environment. This project lasts 3 years, beginning in September 2000.

A principal element of the Project's philosophy was to be as inclusive as possible – drawing in as much of the University community of staff and students as possible. There were two main objectives for this philosophy – to ensure institutional 'buy-in' to the systems being procured and implemented; and to utilise as much of the University's significant expertise as possible to ensure sound and valid choices were made. From the outset, therefore the procurement procedures themselves were set up to be as inclusive as possible, and at the height of the consultation process, the entire University was invited to take part. In fact, about 90% of administrative staff and 30% of academic staff were involved – a very high figure in comparison with other business systems' consultations at this University and others. Students were also represented at most stages, by sabbatical officers and permanent Students' Union staff – the latter to ensure continuity from year to year.

The process used to procure the new Student Administration System was as follows:

- an advertisement for expressions of interest from suppliers published in various journals, including the European Journal, in accordance with public procurement requirements;
- a Request for Information (Rfi) document was constructed and approved by the Student Administration System Selection Team (made up of representatives of key University functional areas). This was mailed to all interested suppliers. The Rfi document was quite large and was criterion referenced. It provided contextual background, but also made it clear what the criteria were for selection of the new system. These criteria were based on a summary Business Process Review activity undertaken by the University;
- at this point in the process, two full-time staff were seconded from within the University. One was a senior academic (to become Project Director), the other a senior administrator (to become Project Manager). Their brief, at this stage, was to handle the rest of the procurement process and to involve the University in it as much as possible. They began a publicity drive to draw in as many University staff and students as possible – the publicity included a website and fliers, but mainly involved visits to Schools and Services, presentations and staff meetings and conferences and so on;
- all of the suppliers were invited to the University for a one-day briefing on the University and its requirements (scripted and identical for all). This was based on the criteria formulated earlier. In addition, the suppliers were briefed on the University's requirements for the rest of the selection process. This caused a little disquiet with some of the suppliers. They wanted to set their own agenda for the days. However, while the University allowed them to do this, it did not allow any flexibility on the attendees of the days (as described below) and warned all suppliers that the score sheets and scoring protocol would remain the same, and if areas that would be scored were not covered in the demonstrations, then they should expect a low score;

-
- the suppliers were then invited to make two days of demonstrations to the University – all staff and representative students were invited to one of these. An analysis of attendance showed that a wide cross section of staff and students attended and all functional and business areas of the University were represented. The first day was for 'main' system users (sometimes described as 'power' users), that is those who use the system for all or most of their job. Generally this included all central student administration staff, finance and so on. IT support staff also attended these sessions. The second day was divided into two where the morning content was to be repeated in the afternoon. These sessions were for the rest of the University – those working in Schools as administrators and academics, and students. Specific requests were made to School teams where academics worked closely with administrative staff for them to attend as a team (for example at this University an Associate Director has responsibility for Quality Enhancement and works closely with an Administrative Officer with a similar brief);
 - attendees were briefed carefully, and were asked to consider each product against what they believed was the best way to operate a function – not the way that the product did it or what the current system does;
 - all attendees were asked to submit scores on a defined 1-5 scale against each function specified on the RfI. We would be happy to supply these documents to interested parties – please e-mail the Director (ian.neal@sunderland.ac.uk). If an attendee felt unable to supply a score (for example, they had no particular knowledge of a particular function) then they were told to put zero (0). This was significant, since the response was then completely omitted from the analysis. The worst response based on an opinion was, therefore, one (1);
 - site visits were made to various users of all four products. Each supplier was asked to identify a number of sites, based on years of using the application (new purchasers, users who had completed implementation and users who had used the products for a few years). From these lists, the University chose which sites to visit, based on similarity with our size and nature. For most of the suppliers three visits were made, based on the years of use mentioned above. Visits were made by functional users of the system. Score/interview sheets were prepared relating to the same functionality and technical attributes as before and scoring was carried out as for the demonstrations. Again, these are available to interested readers from the Project Director;
 - technical reports were prepared by the University's IT service, based on the system and network requirements;
 - the University's Finance service prepared financial reports on the companies, based on the usual financial searches;
 - based on these scores, some of the suppliers were taken to the next stage, which was a one-day evaluation, by a single panel, of each system. The panel was selected and invited to ensure that it included representatives of all users, including academic, administrative, technical and students, covering each of the functions;

-
- the University supplied contextualised scenarios that were identical for each supplier. These used actual data, and made specific demands, although the method that each product used to satisfy the demands was not specified. All functions were covered. All suppliers were given the opportunity to discuss with the University their requirements beforehand, and if necessary to have the scenarios explained, and some took this opportunity;
 - the panel submitted scores for the products and how well they achieved the outcomes required, again based on pro-forma sheets.

A the end of the process, the functional scores, sites visit reports, technical reports, finance reports and cost quotations were presented to the Student Administration System Selection Team meeting (chaired by a Pro-Vice Chancellor) which weighed the evidence and made the system selection based on it. The University made a decision to make the choice based on 'Best of Breed' initially – based on functionality scores received.

Disclaimer

Copyright © Northumbria University 2003.

The statements made and views expressed in publications are those of the authors and do not represent in any way the views of the Service.

The JISC infoNet Service offers general guidance only on issues relevant to the planning and implementation of information systems. Such guidance does not constitute definitive or legal advice and should not be regarded as a substitute therefor. The JISC infoNet Service does not accept any liability for any loss suffered by persons who consult the Service whether or not such loss is suffered directly or indirectly as a result of reliance placed on guidance given by the Service.

The reader is reminded that changes may have taken place since issue, particularly in rapidly changing areas such as internet addressing, and consequently URLs and e-mail addresses should be used with caution.

No part of this document may be reproduced or distributed in any form except by bona fide public sector education establishments or in accordance with the provisions of the Copyright, Designs and Patents Act 1988 and any amending legislation. All reproductions require an acknowledgement of the source and the author of the work. Parties outside the education sector should contact JISC infoNet regarding use of these materials