Embedding Business & Community Engagement (BCE)

Through Business Process Improvement and Internal Engagement

JISC infoNet

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Embedding Business & Community Engagement (BCE)...

...Through Business Process Improvement and Internal Engagement, or 'Embedding BCE' for short, was a project commissioned to investigate the integration of BCE functions within further and higher education institutions.

At this point you may find yourself wondering, 'What is BCE?' If this is the case, you may find it useful to visit JISC Advance[1] for further information on our working definition of BCE. The JISC BCE Programme[2] provides further information on current/future projects[3] related to this area. One thing is for certain, BCE is not something new to further and higher education. It's an integral part of what the sector aims to achieve and links very closely with both 'Learning and Teaching' and 'Research'.

Findings from this resource are based upon work carried out within our five partner institutions:

- University of Glamorgan
- Keele University
- Newcastle University
- Shrewsbury College of Arts & Technology
- University of Strathclyde

This resource distils the learning from working with each of our five institutional partners and provides:

Resources to review business and community engagement activities within your own institution

An explanation of barriers/issues associated with business and community engagement activities within further and higher education

Facts and Figures...

- **Funded by the** JISC BCE Programme: http://www.jisc.ac.uk/whatwedo/programmes/bce.aspx
- **Collaboratively delivered by** JISC Advance Services: http://www.jiscadvance.ac.uk/about-us/services
- **5 institutional partners:**
  - University of Glamorgan: http://www.glam.ac.uk/
  - Keele University: http://www.keele.ac.uk/
  - Newcastle University: http://www.ncl.ac.uk/
  - Shrewsbury College of Arts & Technology: http://www.shrewsbury.ac.uk/
  - University of Strathclyde: http://www.strath.ac.uk/
- **Over 100 individual interviews...**

[1] http://www.jiscadvance.ac.uk/bce

[2] JISC BCE Programme

[3] http://maps.google.co.uk/maps/ms?ie=UTF8&hl=en&t=h&source=embed&msa=0&msid=108443515194888653580.000470ef3ab19a1d16b90&ll=54.123822,-4.130859&spn=9.926264,22.565918&z=6

Reviewing Business and Community Engagement Activities

Reviewing BCE activities allows an organisation to identify its own BCE landscape and assess it in terms of its strategy and vision, or goals and objectives. Having identified the BCE landscape a GAP analysis can then be performed to evaluate whether all strategic objectives are being addressed, whether BCE work is being appropriately prioritised by all elements of the organisation and whether activity is being adequately encouraged, recognised, supported, co-ordinated, costed, resourced, monitored and, where appropriate, controlled.

Benefits and Impacts of a Review

By undertaking a review of BCE activity a number of impacts are immediately evident.

- the organisation recognises the activity and confirms it as desirable and worthy of continued activity
- the organisation is able to promote strategic objectives and priority areas and assess and/or demonstrate how BCE activity aligns to them
- the organisation brings BCE activity to the fore, perhaps bringing it to the attention of some people for the first time
- the organisation learns about or confirms the extent of such activity, its resourcing implications and its achievements and impacts both internally and within external partnerships and communities
- the organisation, by disseminating the findings of such a review, helps its staff to identify new possibilities and potential partnerships and/or areas of engagement through taking existing partnerships and activities from other parts of the organisation and applying them to new and different contexts
- the organisation is able to share both good practice and risk identification and assessment
- the organisation is able to identify strengths, weaknesses and areas for improvement, leading to a development plan for future growth and stronger engagement and relationships both within and external to the organisation
- the organisation has a record of activity that can be exploited to stimulate or inform future streams of activity or prove a track record to help justify future bids for funding
- the organisation can better understand the range of BCE activity undertaken, both formally as part of the organisation's formal activities and informally by staff voluntarily and/or outside of their work commitment
- the organisation can use the information gathered to promote its impact on local, regional and wider communities for both formal external assessment and to attract wider participation from potential students

What 'Embedded' Means

It is necessary, within the context of a review of BCE activity, to consider the nature and meaning of 'embedded' and the degree to which it is desirable to have BCE elements embedded within the core business processes of the institution.

It could be argued that any process that does not 'need' to consider whether BCE is a part of what it does, has obviously totally embedded BCE into its normal process. However...

Resources and Links

- Process Dysfunctions: http://www.jiscinfonet.ac.uk/InfoKits/process-review/process-review-9.9
- Customer/Client Focus in Processes: http://www.jiscinfonet.ac.uk/InfoKits/process-review/process-review-3

Where support of BCE activity is embedded as far as not even being considered as to whether it requires any specific process of its own, or any differentiation away from the 'norm', there is a danger that inflexibility may impact unfavourably on BCE activity.

Note that in this we are not saying 'BCE must be treated differently to other areas of activity'. We are saying that there should be a consideration, an assessment of whether existing processes, if applied rigidly to BCE activity, might cause issues for the organisation in trying to engage with or deal with external communities.

Lack of such consideration often identifies itself when people who have been asked to be part of a review show a lack of understanding as to why they have been included. Assertions such as 'We don't have anything to do with BCE' or 'We do (this) - it doesn't matter what (this) will be used for...' can be a sign that there is a set way (or number of ways) that a process can follow, but that BCE was not a consideration when the process was designed.

It may help to consider, when trying to identify whether or not a process adequately supports BCE, that the two most quoted requirements of external partners, customers, clients (call them what you will) involved in BCE engagement with institutions are flexibility and speed.

Who to Involve

It is imperative to involve the right people when reviewing your Business and Community Engagement (BCE) activities. However in this particular case, we have already considered that some people involved in supporting BCE might not recognise their role in it - indeed, may not have heard of it, or be aware that such activity exists.

Resources and Links

- Project Management infoKit: http://www.jiscinfonet.ac.uk/infokits/project-management
- Stakeholder Management: http://www.jiscinfonet.ac.uk/infokits/project-management/stakeholder-management

You will want therefore to involve all of the core business functions: HR, Finance, Estates/Facilities, IT, those responsible for communications and repository systems such as Virtual Learning Environments or Virtual Research Environments, Web Designers, Marketing, Reprographics, Outgoing Mail Handling and Reception.

You will need to involve any senior member(s) of staff with overall responsibility for Business and Community Engagement activity and any co-ordination roles or teams with a specific function to support such activity. These may be known by a variety of names and may fulfil many different roles such as:

- Business Units
- Business Co-ordination
- Business Development
- Community Engagement
- Enterprise
- Voluntary Work or Volunteer Co-ordination
- Student Placement
- Innovation Centres
- Science Parks
- Incubation Units
- Conference Teams
- Museums
- Festivals and Arts/Dramatic Arts Exhibitions and Performances

You will also need to involve practitioners. Those involved in delivery of work-based learning, adult learning and employer-based CPD. Those carrying out applied research, working as consultants, involved in managing Knowledge Transfer Partnerships. Those involved in Knowledge Exchange, providing opportunities for external companies, organisations and individuals to come together to share information in a forum environment. Those running or attending business meetings, special interest groups, or working in collaborative partnerships to secure external funding from new or wider sources.

Much Business and Community Engagement is carried out under the context of Academic Freedom, initiated by individuals, particularly in the HE Sector, because of a particular interest or line of research that the academic may have or wish to pursue.

You may want to seek out and involve those who are already well known for their work in these areas, but in addition it would be well worth communicating widely and asking for those interested to come forward. Any problem is far more likely to be found in reducing those who do come forward to a manageable number, rather than not being able to interest enough people to make a review possible!

The JISC infoNet Project Management infoKit has a section on Stakeholders that is of great relevance here.

Last but certainly not least, you will need to identify the person or team to plan and carry out the review. This is discussed in the section on the Review Methodology.

Review Methodology

It is strongly recommended that the review work be undertaken following project management guidelines as promoted by JISC infoNet in the Project Management infoKit. In particular, any such project should ensure that it is supported by a committed Project Sponsor, with cross-institutional influence to ensure that all institution staff will engage with the review.

Resources and Links

- Project Management infoKit: http://www.jiscinfonet.ac.uk/infokits/project-management
- Key Roles: http://www.jiscinfonet.ac.uk/infokits/project-management/key-roles
- Diagnostic and self evaluation workbook: http://www.jiscinfonet.ac.uk/infokits/embedding-bce/workbook

The review of BCE activities comes in three parts. Firstly, a series of one-to-one interviews with managers of BCE-specific areas such as co-ordination units, Innovation Centres, Conference Organisers and practitioners involved in CPD delivery, work-based delivery, applied research, medical liaison, Knowledge Transfer and Exchange etc. Then a self-evaluation workshop using the diagnostic and self evaluation workbook, designed as part of the project, is held to assess the organisation's strengths and weaknesses under the headings of:

- Policy and Strategy
- Processes and Business Systems
- Partnerships and Resources
- Roles and Responsibilities
- Measurement of Performance and Customer Perception

The workshop should be operated under the Chatham House Rule - delegates can say whatever they wish and be open and critical but no remarks should be attributed outside the meeting.

The workbook makes a series of statements under the headings given above which are then discussed by the delegates in terms of how well the organisation meets, exceeds or fails to meet the statement. During discussions a scribe takes note of any asserted strengths and weaknesses and identified areas for improvement. Delegates are requested to score the organisation as a whole against a scoring system set out in the workbook. Where a range of good and poor practice exists, delegates are encouraged to consider the overall score in terms of the balance of good and poor practice. The workbook needs to be facilitated by a chairperson able to keep momentum going without stifling any healthy discussion. The workshop is likely to require four or five hours in total. It is also almost certainly going to create disagreement around the table at some point.

Finally the identified areas for improvement, alongside any such identified during the interview process, are prioritised and an action plan formed to implement improvements within the organisation.

The review must engage with stakeholders before any of this can happen. Reviews carried out as part of the 'Embedding BCE' project were preceded by an Internal Launch Event that brought together major stakeholders from core business functions, co-ordinating or service functions, Heads of Faculty/Department/Research Institutes and practitioners involved in Business and Community activities.

This internal event started or ended with refreshments and:

- Set out the external drivers for Business & Community Engagement
- Set out the context for the review i.e. that it would:
    - Identify the BCE Landscape of the organisation
    - Identify how well supported BCE activity was by core business processes and any issues affecting such support
    - Identify whether BCE activity was linked to strategy and assess how well any strategy was disseminated
    - Identify the links and impact of BCE activity on mainstream teaching and learning and vice versa
    - Identify staff perceptions of BCE activity and any issues arising from perceptions
- Introduced the workbook and the concept of the self-evaluation workshop.
- Undertook an exercise to start to identify the organisation's BCE Landscape. This also helped identify interviewees.
- Stressed that the end benefits were to include a prioritised and agreed development plan.

Diagnostic and Self Evaluation Workbook

This workbook is a diagnostic tool designed to help educational establishments to review and evaluate the extent to which Business and Community Engagement processes and strategy is embedded within the mainstream activities of their institution.

Completion of the workbook aims to help institutions to diagnose the things they are doing well and where they can improve. It will hopefully stimulate productive discussions and debate leading to new ideas and agreed change and improvement actions.

The workbook contains 6 sections which cover fundamental criteria for effective BCE activity. The first four sections deal with how you structure, manage and implement your BCE strategy and plans. The second two sections deal with what you measure and the way you use information about your performance and achievements.

The workbook offers further explanation on how to undertake such an activity and can be downloaded here: BCE: Diagnostic & Self Evaluation Workbook[4].

Policy & Strategy

Any large area of activity should be acknowledged and included within the policy and strategies of an organisation in order that it can be prioritised, managed, resourced and monitored.

Any review of Business and Community Engagement activity needs to identify if there is a strategy for the activity and a senior manager with overall responsibility for the activity. The strategy could be a dedicated strategy, or it could be catered for by specific mention in a strategy with a wider or overall scope. The review should seek to identify, even where a strategy exists, whether the resourcing and support of this type of activity is catered for by its inclusion in related strategies such as any Financial, HR, Marketing and IT strategies.

The review also needs to identify whether the dissemination of the strategy is effective.

- Where a strategy exists; are staff aware of it, do they know where to find it and do they have a grasp of the content of it?
- Do they know how their own roles address or impact on the strategy, or is the activity unrelated to it?
- Are there any links between activity and strategic objectives?
- Is there a strategic plan to direct activity in specific areas and, if so, is there a line management chain of authority to ensure that this happens?
- Is there a single role identified as having overall responsibility for Business and Community Engagement, or is responsibility placed with team, faculty, school or department management?
- Where the latter is the case how does that impact on any collaborative work that requires input across two or more divisions of the organisation?
- Is the strategy implemented by way of target setting for Business and Community Engagement?

Targets and measurement will be discussed later in this resource, but the setting and monitoring of targets can be an effective way of stimulating buy-in and engagement of staff.

- If there is little or no evidence of strong direction of activity, how does any existing activity emerge?
- What are the drivers and justifications for it?
- Does the lack of strategic importance place any barriers before practitioners in terms of securing the necessary support for the activity in terms of staffing, resources, technological systems and functionality etc.?

Findings from the 2008-2009 Embedding BCE Project

The project found evidence of specific strategy documents for Business and Community Engagement in all five institutional partners. There was a strong sense of importance given to the work at senior management level and within those members of staff involved in Business and Community Engagement activity.

[4] http://www.jiscinfonet.ac.uk/infokits/embedding-bce/bce-self-evaluation-workbook.pdf

In other areas, however, there was not always recognition of Business and Community Engagement as a prioritised strategic activity. There was evidence of a perception held by some of those who were involved in more mainstream teaching and learning or research that working with external partners was less important than traditional core areas of activity.

In some cases this led to a reluctance to be involved with it and there were instances of dismissal of such work as *'unimportant'*, *'a distraction from what we should be doing'* or even, in one case, an assertion that a core supporting function of a university was *'only funded to support teaching and learning and research. We are not resourced to support (Business and Community Engagement).'*

The project found that core business functions were the most likely teams not to be aware of strategy and policy documents relating to Business and Community Engagement. As a result of this, those who were unaware in most cases did not differentiate between Business and Community Engagement and other types of work when providing services which resulted in some issues for the practitioners in terms of inflexible working practices either failing to expedite a result as swiftly as was required, or failing to recognise more business-like approaches such as 'pump-priming' - the expending of resources early in a process in the hope of gaining rewards later.

The project found that much activity, in the HE Sector particularly, was emergent in nature and that work, particularly in the applied research arena, was started because it was related to the interests, skills and knowledge of the lead researcher rather than to a stated recommendation in a strategic plan that such work be sought. Activity was reliant on the *'academic freedom'* principle whereby practitioners have the flexibility to self-direct effort. The principle is uncommon in the FE Sector (as is research activity, where the principle is mainly exhibited) and the project uncovered no evidence of this type of activity in FE relating to formal work, although there was some evidence of it in an informal sense where extra-curricular activity led to engagement with external communities in areas such as dramatic and fine art, sports and hair and beauty courses.

Despite this self-directed approach to initiating engagement, there was evidence, where an institution had made clear the general areas of work that it wished to prioritise, that practitioners had also prioritised similarly. Practitioners were able to relate what they were doing to the organisation's priorities so that to some extent the work was being channelled, if not exactly directed, towards addressing strategic objectives.

Processes & Systems

Assessing the suitability of business processes and the technological systems that support them is a major focus of the review. Much of the information to allow an assessment to take place will come from the interview process, carried out with both core business teams and managers and practitioners within the Business and Community Engagement arena.

It will not necessarily be the top priority of those people being interviewed.

Practitioners and managers, quite naturally, will want to describe their areas of work and to tell you of their achievements. You will have to repeatedly steer the conversation so as to obtain the perceptions and information you require.

However, appearing to ignore or making it obvious that you are not writing down this information about the work they are undertaking will project a negative image and interviewees may start to distrust you with the result that they are less open about the things you want to hear.

In the Embedding BCE project there was an issue where someone complained that what they said had not been recorded - though it was likely that it was either not relevant or was a repetition of what someone else had already told the interviewer. Following that, everything was written down, even though it meant that there was lots of repetition and irrelevant material to read through and discard later.

Perceptions versus Reality

It is worth making a point here about perceptions. Not everyone that you interview will have a full knowledge of all the financial, HR, IT and marketing procedures and rules. Sometimes you will hear assertions that you know to be false, or not totally correct. These are signs that someone is making assumptions, or has a false perception that may be the result of incorrect information, or a belief formed during an exceptional case.

Whilst checking that you heard correctly is permissible, contradicting someone during an interview will cause them to withdraw from offering information. It is better to take the perception down and check it against the perceptions of others.

As an example, at one institution, a practitioner complained that financial procedures were too inflexible. Yet a senior manager at the same institution said that it was possible to by-pass some financial procedures. The truth was somewhere in between the two statements, in that certain procedures could be made more flexible if you had sufficient seniority. However the two statements identified that the way of securing the flexibility had not been adequately disseminated internally.

Central Co-ordinating Units

The 2009 Embedding BCE project found examples of central co-ordinating units in all of the partners, although their functions varied considerably. Some aspects of Business and Community Engagement may require a dedicated central co-ordination role. Examples of these are Science Parks, Innovation Centres, Spin-out co-ordination, conference centres.

Other roles are handled by centralised units in some institutions and by individuals or faculty/department-based units in others. Common roles included business development (concerned with searching for business opportunities for the institution, particularly in the area of work-based CPD delivery), contract negotiation, licensing of Intellectual Property (advice, costing and administration), funding bids (advice and writing), programme and project management, student placement and voluntary work advice and placement.

Any review of Business and Community Engagement should seek to identify such centralised resources and the services offered. Managers and some staff within the resources should be included within the list of interviewees and questions should elicit an assessment of take-up and engagement internally. The nature of links to other centralised functions needs to be identified and understood, with finance in particular being a key function usually associated with such units. Any barriers and issues that the central resource has should also be identified and tested against the perceptions of its users.

Also to be identified is the nature of the relationship with its users. Is use of this resource a constraint for its users or is it optional? Where it is optional, how widely is it used? Are Service Level Agreements in place? How is it resourced - does it charge for its services and are any charges fixed or are they based on percentage of income? How do users feel about the service provided? There is likely to be a difference of opinion across the institution of the worth of such resources and both pros and cons offered which may, when tested, point to both strengths and weaknesses or identify areas for improvement.

As an example, the contract knowledge and negotiation abilities of one central resource were described to the Embedding BCE project in glowing terms. However, some departments of the institution felt that there was a lack of understanding within the staff of the central resource about the particular business of the department. Conversely, staff of the central resource felt that on occasion academic staff had unrealistic views of the value of work to be licensed.

The nature of any contact with external bodies (organisations or individuals) by Co-ordinating Units should be identified and processes documented. In particular services or units with a Business Development role often take on an outward marketing role and it is important to know how this occurs, how any data or information is stored, what IT systems are used, how any marketing materials are produced etc.

The Business Development Unit at Shrewsbury College marketed courses as though they were offered to employees by their own employer. The college branding was secondary to the employer's own branding and, indeed, the college used the employer's own document templates to produce the materials. The college logo was included with a strapline 'in partnership with' or similar. The college even had exhibition stands for loan to companies to display their materials on. Such an approach widened participation from students who might otherwise not have approached a college directly.

Finance and Financial Considerations

The Finance Department, as one of the major core business functions, needs to be consulted as part of any review of Business and Community Engagement.

It will be necessary to identify how Business and Community Engagement activities are resourced internally in addition to how income streams from such activities are dealt with. The nature of services provided by the central Finance Department must be identified, together with the sources of such functions if not provided by the central department. These could be services such as assistance with costing, invoicing, payment for goods and services to the university, release of funding to other budgets as required from central or external funding sources, control and audit functions and financial reporting mechanisms.

The use of any standards or constraints around the costing of services should be tested to ensure that there is both a structure to follow to enable a consistent approach and yet some flexibility to cater for circumstances that may only arise in a Business and Community Engagement context. Examples of these found during the Embedding BCE project included:

- the desire to offer a new product or service on either a cost-only basis or a loss-leader basis. The latter is where a new service is offered to customers at a lower-than-cost basis as a tester, to stimulate interest and future take-up of the product at a healthier rate. This is a well known approach in the commercial sector, but is not common at all in the education sector and is likely to challenge the culture within most finance departments.

- the ability to offer deferred payment schemes
- the ability to offer payment by instalment schemes

In some cases, the policies and financial regulations of an institution must be examined to determine if such approaches are possible - with a consequent evaluation of amendment if current regulations do not allow them.

The Embedding BCE project found evidence that the instigation of such exceptions to the norm, in at least one institutional partner, required the approval of a senior member of staff and it would seem a prudent approach that would not allow such approaches to become simply the norm.

IT & Information Systems

The use of IT, the systems being used, the nature of their use, how they are developed and supported and an evaluation of any issues arising should be a part of any review of Business and Community Engagement. The need for systematic access to information and storage of data is widespread and vastly diverse across the landscape of activity that makes up Business and Community Engagement.

Access to IT Networks and Information Systems

A key requirement for many practitioners working in this field is to carry out one's activities off-site. Teaching staff engaged in the delivery of Continuing Professional Development courses at employers' own premises and those involved in other training off-site, such as less formal courses in the wider community can have a great reliance on online materials.

These can be delivered by a Virtual Learning Environment or from web sites, either static or interactive and collaboratively hosted either by the institution or a collaborative partner, or commercially. Access for delivery or for learning is not normally an issue where those being taught are members of the enrolled student body. Access where those being taught are not enrolled students, whether they are from a partnership operated on a commercial basis, on a fully economically costed one-day workshop, or under another form of partnership, can be problematic where registered logins to the Virtual Learning Environment is tied to an enrolment.

For teaching staff, the problem is more likely to be access to institutional systems and networks for development purposes. In many institutions, access to internal networks is not available to all staff unless they are on the institution's premises. External access by Virtual Private Networks (VPN) which give direct modem-to-modem access or by Internet access using software such as Citrix is by no means universal.

For those staff who spend the bulk, or all, of their time off-site this can cause problems with using the institutional VLE. There are also many staff carrying out delivery as third party sub-contractors, particularly within the FE sector, who do not have any access at all to networks, software tools or the development side of VLEs. A common solution is to develop stand-alone web sites to host materials, often using free web space from ISPs, tools such as wikis, or repositories such as Google Docs.

Use of such tools allows external staff to develop and deliver materials on a 24/7 basis from, and to, anywhere with Internet access. In such cases the loss of Intellectual Property to the institution can be total.

Similarly the institution can lose the ability to co-ordinate and share information where staff do not have access to database-driven information systems such as Customer Relationship Management systems (CRM), or contract and costing tools, financial and student database etc.

Virtual Learning Environments

The Embedding BCE project found widespread use of Virtual Learning Environments in the delivery of teaching & learning off-site. Few staff who used such systems had negative things to say about them although there were a few comments about the difficulties of developing teaching materials in terms of access to the systems from outside the institution (see 'Access to IT and Information Systems') and the need for technical assistance in order to develop more interactive or media-enriched materials.

Customer Relationship Management

Customer Relationship Management systems were found to be in varied states of development within the partners. More than one partner had not yet implemented a CRM, but had projects in place to procure and implement. All reported high expectations on the part of staff of such systems, but there was also a quite high degree of caution as to the practicality of such systems, based on the requirement for all staff to contribute data to enable such a system to be of use.

Many interviewees spoke of a desire to cut down the number of times they attended external meetings to find someone else from the same institution present. However it was also pointed out that between any two departmentalised organisations there were likely to be a number of relationships across both departments and functions and at various hierarchical levels. There was a potential source of concern for Data Protection issues in that a CRM system may be used at senior and executive level to hold contact details for publicly-known figures or senior government officials and ministers, whose details should not be available to all staff.

Research Repositories

The project found it difficult to understand how data collected during the course of research was stored. Research staff were either reluctant to talk about IT, or did not understand the relevance of the questioning. This may point to the fact that use of standard pieces of software such as word processors, spreadsheets and perhaps databases, have become so embedded as tools to help in recording and storing data that they do not readily come to mind - in the same way that you would hesitate to say 'I use a pen' if someone asked how you wrote something. This difficulty in obtaining information about the use of new technology was also reported by another similar JISC project, whose project team contacted the Embedding BCE project staff to ask if we had experienced the same phenomena.

However, one response was given repeatedly to a particular question that is worth highlighting here, although it raises more issues than it does answers. When asked 'How is your Intellectual Property stored?' a common response was: 'In scientific journals'.

If this is to be taken as a fully complete answer, it suggests that institutions have to purchase their own research findings in the form of subscriptions to such journals. The resulting repository has then to be stored in an inflexible format that does not lend itself readily to further exploitation or deeper examination by others. In any such review, this should be tested. However the experiences of at least two projects show that it may not be easy to obtain a response that does not in itself raise further questions.

Development and Support of Information Systems

The development of information systems to support Business and Community Engagement was an issue for all partners in the project.

Many forms of engagement activity require unique solutions to storing data in terms of both the type and quantity of data to be stored and the reporting output. In the early stages of a new engagement activity the precise data requirement may not be fully identified. Information systems start small. In many cases the requirement can be handled by one or more spreadsheets which are designed, updated and self-supported by the practitioner or team.

However if the initial engagement becomes sustainable and continues, and especially if it grows, the data storage requirement in terms of quantity of data can soon outgrow a spreadsheet approach. A database-driven system becomes necessary. In many cases this can be catered for by the practitioner or team creating a local database using MS Access or similar.

By the time that the data problem becomes large enough to require a more sophisticated and robust approach, the design of which demands a higher degree of skill and experience, the IT or Information Systems development staff are faced with large issues in terms of legacy data and incompatibility with Corporate Systems' data structures.

The problem is two-fold:

- At what point should practitioners approach the IT or Information Systems development staff for assistance? Systems start small. Would the development staff want to, or have they capacity to, take on or assist with the development of a small requirement that may only be used for a single project that may last for a short period? This is an issue that strikes a deep chord with institutional database development staff. Most considered themselves willing to give advice, even where they didn't have capacity to take on the development. It was felt preferable to having to sort out issues of trying to re-code and integrate large amounts of data to interoperate with Corporate Systems at a later date. Yet practitioners' perceptions were that they would not 'want to be bothered'. Even if willing to be involved in development, how long would the development take? We have already reported in this resource that a major consideration in Business and

Community Engagement is the need for a speedy response. A solution that might take weeks or months is unlikely to be a viable solution when the opportunity for a new engagement project arises.

- Secondly, few staff, either academic or administrative, have full access to the major information systems or the authority to decide on coding systems and uses for any spare data fields, built into such systems by software companies to be utilised according to local need. Whilst reporting output may be readily available (there is an emphasis on the word 'may'...), in most cases it is not easy to download or even (particularly?) link to the simplest of data from, say, the Student Record System, to reduce the need for duplication in a local database system. Without having access to the database structures field names, data types and lengths in a locally developed database rarely match exactly to their counterparts in Corporate Systems, leading to an exacerbation of problems if the success of a Business and Community Engagement project outgrows the local system.

Systems Policies and Communications

Given some of the problems identified within the Embedding BCE project and highlighted in 'development and support of information systems', it makes sense for any review project to identify the extent of access to mainstream Corporate database systems such as Student Records, HR and Financial systems, Customer Relationship Management, Libraries and VLEs etc. Secondly the review should seek to identify any local systems in existence.

Identifying not only who has access but the nature of that access - i.e. is it read only/read and edit/read, create and edit; is it access to the main software or report output only - and seeking perceptions on who requires access and for what purposes would gather much of the data necessary to gain a picture of:

- official users of Corporate Systems
- the nature of access
- requirements not currently catered for
- current levels of interoperability between systems
- potential risks where duplicate systems have sprung up

Where the support team for Corporate Data Systems sanction local developments, they can ensure that any duplication of data is minimised, that existing official coding systems can be used consistently to aid any future links or conversion, that data structures are consistent (e.g. that there is a first name field of x characters length, a second name field of x characters and a last name field of y characters) and that data owners and developers of local systems understand that any data changes made to local systems are not necessarily going to be reflected in Corporate Data unless notified to the correct data entry team. One of the big risks introduced by local systems is that of the 'my data' syndrome, whereby any updates given by students or other data subjects - change of address, a change of name etc. - is made only in the local database. The syndrome in full is 'my data is correct - corporate data is not my responsibility'.

Also the review should check for any written policies covering data access and interoperability links and where such policies exist, the general awareness of and ease of access to them by users and potential users.

Facilities Management

Facilities Management teams can include various functions and this is not consistent across the sector. In this resource we are mainly concerned with the Estates provision, maintenance and use, including buildings and grounds both on campus and single off-campus sites such as museums, shop and office premises used by institutions, conference facilities etc.

Some activities usefully bring students into contact with local communities, promoting both the institution and its work and the students themselves, in activities such as hairdressing salons, massage and beauty treatments, theatre and musical events, exhibitions and festivals.

Suitability of the Environment

One of the potential barriers to bringing mature people from either the business sector or the wider communities onto a campus can be their perception of young people, their behaviour and the environment they will be entering. Perhaps this is an issue for Further Education even more so than universities, where students are themselves more mature, but studies have shown that today's mature generations are less tolerant, less trusting and even more afraid of teenagers and youths than ever before e.g. Bernardo's poll in 2008[5] - 'Research conducted by YouGov shows that the public holds a negative view of all children, despite the vast majority of children making positive contributions to their communities, attending school, taking part in activities and a significant number volunteering.'

Refectories and food outlets are main areas of concern. College refectories can be noisy places and the food that teenagers prefer is not necessarily the menu of choice for mature people. In the past some colleges have experimented with separate student and staff refectories, then the staff refectories were opened to more mature students and that could include opening them to young children from college crèche facilities whose parents were students. Some institutions have introduced high standard food outlets and restaurants which tend to provide a quieter more peaceful environment, but at a cost.

Many CPD and meeting areas are furnished to high standards and catering areas included with comfortable seating. Alternatively, arrangements are made to bring catering into the meeting room. Some multiple site institutions have nominated a smaller campus or single building site for use by business units where professional CPD courses can be run and meetings for business or knowledge exchange can be held in a more conducive environment.

The environment on offer and particularly the first impressions of it, remain an issue when Business and Community Engagement activities are being planned.

Generally within the Higher Education sector (although not exclusive to it), Science Parks, Innovation Centres and Business Incubation Units can provide the means to interact with new businesses, with high technology industries and provide premises within which to set up spin-out companies from research activities. Such centres can be on separate premises altogether or set up on quieter parts of large campuses where younger students, whilst not necessarily excluded, do not have reason to frequent.

Such areas can often be funded via partnerships with Regional Development Agencies, Local Authorities, Business Agencies and other funding partners. Tenancies can be wholly controlled by the institution or subject to constraints

[5] http://www.barnardos.org.uk/news_and_events/media_centre/press_releases.htm?ref=42088

under the terms of start-up agreements. Quite often companies in such premises can contract with the institution which provides further services such as HR, IT and other administration and support services.

Business & Communication Engagement Opportunities for Estates

At the University of Glamorgan the Embedding BCE project was told of a garden project where a plot of land had been set aside for use by local schools. The Facilities Management Team provided basic services, piped water etc. and liaison with the schools using the facility.

Hire of premises is another common way of interacting with wider communities for meetings, sport, local societies and larger scale conferences.

Large institutions can often be pioneers in the use of new sustainable technologies and there is a potential untapped resource of knowledge within Facilities Management teams that could be utilised to bring knowledge of these technologies and their implications to a wider audience.

Human Resources

In this Human Resources section we will consider not just those aspects of existing functions of the Human Resources Department but also the human factors - opportunities, demands, perceptions and barriers of cultures and climates within sector organisations that affect the abilities or willing engagement of staff to become involved in Business and Community Engagement.

Culture and Perception of Value

The Embedding BCE project team was immediately struck by the perceptions of Business and Community Engagement activities on the part of both those involved and equally by those who were not engaged or involved in it.

Those who are involved in it value its worth, can point to successes in terms of generated income and the part it plays in widening participation and engaging new communities and can show impacts on the well-being and social cohesion of communities both local and elsewhere. They can show how external perceptions of and attitudes to the institution have changed for the better because of Business and Community Engagement and in the Higher Education sector it is often quoted as a way to lose the 'ivory tower' image of universities.

However, in many HE institutions there remains a perception amongst some staff that Business and Community Engagement is not of the same value as Teaching and Learning that leads to a degree or as pure research. 'It's not proper research' was one comment about applied research undertaken in partnership with a commercial company.

Some of this may be attributed to terms used in the past to describe Business and Community Engagement. 'Third Stream' tends to suggest an order and perhaps that the first two streams of Teaching and Learning and Pure Research should be considered more worthy. The word 'Third' can suggest a poorer partner - used in terms such as 'Third World'.

However in part the perception may also be because, unlike in Teaching and Learning and Pure Research, there are no well-established measures of success or routes to personal progression. Many practitioners reported the difficulty of securing promotion or of evidencing past achievement to move between institutions in a way that they knew would be acceptable and valued.

The perception of the value, or lack of it, placed on BCE-related activity had been identified throughout all of the HE partners involved in the Embedding BCE project and a solution was being sought, however this was likely to involve something of a cultural change.

Working within a Capitalist Marketplace

One of the issues is that of working with companies motivated by making a profit. Many people join public sector organisations because they do not feel comfortable with a capitalist society and so the increased prioritisation to work with profit-making companies is a challenge. Another potential barrier is that traditionally universities have published research findings in journals and both universities and staff are measured in part by the amount of such publications and, also in part, by their worth, which is judged according to which journal publishes the work. Where private companies are involved, particularly where they are part funding research work by way of cash injection or staff time, even where they have agreed to results being published for the greater good, they usually want to have some commercial edge - a period during which they can exploit the results of the research before any publication of results opens the research to their competitors.

A criticism of universities by companies that the Embedding BCE team spoke to for background material, was that staff can sometimes appear to have no understanding of this need to exploit research before competitors. In one or two instances companies reported annoyance at university staff showing contempt of their need to make a profit. Whilst the universities concerned will remain anonymous it is only fair to point out that they were not amongst the partner universities of the project.

New Ways of Working - Old Terms and Conditions

An issue identified in Further Education was the inflexible terms and conditions of 'traditional' lecturing staff. Staff were measured against a requirement to teach a specified minimum number of contact hours during an academic year. Against these conditions there is no scope to offset contact hours against time spent in travelling to and from a class or meeting off-site.

In addition, under the traditional terms and conditions it was expected that the vast majority of teaching would be undertaken during the normal working day, not including nights and weekends. This made it harder for lecturing staff under these terms to be as flexible as might be required to service work-based learning.

Consequently in Further Education most Work-Based Learning is delivered and assessed by either staff recruited specifically to different terms and conditions to standard lecturing staff, or by third party sub-contractors. Where these are third party suppliers rather than college staff this can lead to further issues of access to IT systems, previously discussed in this resource. The easy option is to use freely available commercial webspace for materials rather than official college systems such as VLEs, leading to issues of accessibility, reduced features and interactive content and, to the college, loss of the IP and ownership of materials for re-use.

The Human Resources Function

It was common for representatives of Human Resources teams in the Embedding BCE project to claim no knowledge of Business and Community Engagement. In fact some were nervous at being asked to take part, thinking that they had nothing to offer the project. When recruiting staff their main consideration was whether the post was funded and had been approved. Once that condition was met, standard recruitment procedures were invoked to fill the post. Unless there were other arrangements to speed up the process - such as a list of potential short term contract staff such as exists in Further Education for Adult Learning teachers - there was no way of expediting any requirement for a speedy response to recruitment. In this case Business and Community Engagement processes were not so much embedded as totally absent and the successful and timely outcome reliant on a match between the requirement and one of a limited number of existing options.

Business and Community Engagement by Human Resources Practitioners

At Glamorgan University one member of the Human Resources team was involved in a voluntary capacity raising awareness of employment legislation and responsibilities such as equal opportunities within the local business community. This involved giving presentations and attending meetings at either individual employers or at regional special interest meetings.

Partnerships

Institutions must form a great many partnerships in order to successfully engage with external communities. There will be multi-level partnerships where people at different levels of each organisation's hierarchy within the partnership need to meet, communicate, exchange information and form mutual plans.

Such multiple partnerships between organisations require careful handling if they are not to lead to occasional duplication and risk of confusion or alternatively links not being made or tasks not being undertaken because everyone concerned assumed it was the responsibility of someone else.

We identify for this resource a number of different types of partnership, although it is recognised that between an institution and any other organisation there may be several relationships between the two organisations that could fall into several types.

Funding Partnerships

Institutions in seeking to maximise growth need to form partnerships that bring opportunities for new sources of funding. This may be because the potential partner organisation has direct sources of guaranteed funding, or because the two (or more) organisations working in partnership (bringing together varied skills and knowledge) can become eligible to apply for funding that, singly, none of them could secure.

Strategic Partnerships

Whilst many strategic partners may also be a source of funding, other potentially positive outcomes that may result from this type of relationship include:

- political advantage
- added prestige that may open doors and bring opportunities
- opportunity to contribute to, and shape, policy
- the identification of large scale national and international drivers governing the direction and emphasis of educational institutions.

National and local government organisations, Regional Development Agencies and other Quasi-Autonomous Non-Government Organisations (QUANGOs) may fall into this category. However, major corporations and influential businesses both national and international as well as major regional companies could be included under this heading. Businesses can often act like individuals - sometimes they are only willing to be involved in a partnership if a company they want to do business with, or aspire to emulate, are already part of a partnership.

Commercial Partnerships

These are partnerships where one of the partners is paying for goods or services from the other partner(s). Consultancies would fall under this heading. The consultancy could be provided by the institution, or could be being provided to the institution.

Knowledge Exchange Partnerships

These can take many forms and are evident in both Further and Higher Education institutions. However it is less likely that FE institutions will have consciously identified them as a Knowledge Exchange Partnership. Membership of a forum such as the local Chamber of Commerce, membership of organisations such as Universities and Colleges Information Systems Association (UCISA), Association of University Administrators (AUA), Association of Colleges (AoC), membership of trade-based associations and trade unions are all examples of a Knowledge Exchange Partnership. Institutions can instigate or facilitate Knowledge Exchange through formal and informal gatherings of like-minded individuals in the form of meetings, conferences and adult classes, many of which have a social aspect to them, all of these being staged by the institution.

Exchange of knowledge can also occur on a less formal basis through membership of mailing lists, online forums, special interest groups, social networking sites, alumni associations and through personal interaction with colleagues and others at conferences and socially.

The Embedding BCE project identified that institutions were often less successful at exchanging knowledge internally than externally with, for instance, low take-up internally of places on conference-type activities organised by the institution.

Knowledge Transfer Partnerships

Here we must acknowledge the differing uses of terms across the sector. What we are about to describe under the heading of 'Knowledge Transfer Partnerships' some institutions will be thinking should have been included under

'Knowledge Exchange Partnerships'. As with many areas of work and activity within the sector, institutions should apply the relevant terms in use internally unless it makes sense to them to change in light of the information given here and elsewhere.

A Knowledge Transfer Partnership is where a post-graduate student is placed with a company, usually at a high level, to implement some change or to run a project. The student works within the company and is supervised by the company whilst being monitored, perhaps once a week, by a lecturer.

The company gains from the knowledge of a postgraduate worker and the institution gains knowledge of current thinking and issues for the trade area of the company and an informal case study of management practice and processes. It was reported that in many instances, the post-graduate placement can gain employment with the company at the end of the placement.

To the company, this form of partnership is very similar to a consultancy and a balance should be sought between the amount of information gained by each party. Commercial companies need to guard their Intellectual Property, including details of processes and decision-making as well as physical products and are quickly disengaged by attempts to (as they see it) 'mind-suck' their knowledge and processes.

CPD Partnerships

More of a provider/customer relationship than a true partnership, where the institution agrees to deliver continuing professional development courses to the employees of the other party. The development of such courses may require a high level of mutual development and understanding between the two partners before delivery can begin, or may involve an 'off-the-shelf' approach.

In many cases funding for such course delivery can come from the institution's main funding body, as is the case with much Work-Based Learning provided by the Further Education sector. Many competence-based courses are taught and assessed to NVQ qualification standards with little need for further course development. The Train-To-Gain initiative has been a huge success story for many FE colleges and has given thousands of employees a recognised qualification, often for the first time.

Whilst this meets one UK Government strategic driver - raising the number of qualified people in the domestic workforce, which is a directly comparable measure within Europe, it has been less successful in addressing another UK Government strategic driver, namely the contribution of UK industry towards the costs of training its workforce.

The success of colleges in exploiting NVQ provision to the needs of their employer partners has therefore led to problems in the sustainability of the funding. However, where employers are looking for specific skills not covered by NVQs or are looking for training at higher levels, both the FE and HE sectors have responded by developing training on short-courses at a range of price levels from subsidised cost where core funding can justifiably be used to full economic costing.

Both FE and HE institutions argue that full economic costing makes them uncompetitive in markets well covered by private training providers due to large overheads in premises and staffing costs.

Institutional Training Partnerships

'Supply Chains' can be an emotive phrase to use in an educational institution as the Embedding BCE project found. However in terms of providing training to employers it is likely that there will be more than one supplier to any employer or organisation.

Any organisation, whether in the public or private sector, which has a range of staff undertaking varied jobs or tasks, requiring a range of skills at various levels, is likely to source training from colleges, universities and also some private training providers.

Whilst the term 'supply chain' challenged at least one individual within the project almost to the level of health risk, it is included here to promote the forming of partnerships with other local or regional colleges or universities so that if the partner is already supplying training to an organisation who asks for training at a level best supplied by an organisation from the other sector, a reference can be given.

Resources and Links

"The National Co-ordinating Centre for Public Engagement [NCCPE] is part of the Beacons for Public Engagement project. Our role is to inspire a culture change in how universities engage with the public. We work with all the beacons to promote best practice in public engagement and provide a single point of contact for the whole higher education sector. We also work strategically with our key national partners to help develop work across the sector."

- NCCPE: https://www.publicengagement.ac.uk/

Public Engagement

Any review of Business and Community Engagement should seek to identify the various ways that the institution engages with the general public. Both FE and HE institutions come into contact with members of the public in a variety of ways and for a variety of reasons.

Whether it is a potential student or a parent or other interested parties including the Press, both colleges and universities receive a huge number of requests for information about their courses and activities. The Freedom of Information Act 2005 has made it easier for the general public to get information from institutions and the Sector has had to respond with systems for storage and retrieval of information in order to meet the deadlines set by the Act.

These requests can come to any member of staff and so a staff development exercise was called for to ensure that that requests would be dealt with consistently in a timely manner and be recorded.

What is Public Engagement?

"Beacon North East defines public engagement as a mutually beneficial, two-way interaction between the universities and community members or organisations." - Beacon North East[6]

The National Co-ordinating Centre for Public Engagement provides an excellent summary of '**why public engagement matters**[7]', covering the moral, business and academic case for doing so.

Examples of Public Engagement

Many institutional libraries are open to the public either for reference only, or as a full public lending library.

"The East End Campus of John Wheatley College in Glasgow has been designed as a community resource with publicly accessible library and child care facility - Students, staff and members of the public are exposed to new, more eco-

[6] http://www.ncl.ac.uk/beacon/about/engagement.htm

[7] https://www.publicengagement.ac.uk/what-public-engagement/why-does-public-engagement-matter

friendly working, learning and living practices. All of this helps to prepare local residents for some of the practicalities of living and working in a 'low carbon' environment. John Wheatley College in Glasgow: East End Campus8"

Myerscough College[9], a Land-Based specialist college in the North West has a library that is part of the County system. This means that students and staff can borrow any book held by any library in Lancashire and the public has access to any on-loan book from the specialist library at the college.

Many colleges offer services at a cost to the general public to give students practical experience in their chosen field of study. Restaurants, hair and beauty salons and massage services are an integral part of relevant courses and offer services to the public normally at a slightly lower rate than they would pay at a professional commercial outlet.

A common area where the public come into contact with students is public performance. These can be on campus or through local festival involvement and local theatre.

Institution and Local Authority Partnerships

A number of joint ownership and joint-funded projects exist where facilities such as sports and leisure amenities are used by the institution by day and the general public in the evenings and at weekends. Sports fields, swimming pools and spas are all examples of this type of agreement between educational institutions and local authorities.

Roles and Skills

Most of the roles and skill sets required to successfully undertake Business and Community Engagement are not exclusive to that type of activity. What does set Business and Community Engagement apart from other areas such as traditional Research and Teaching and Learning is the speed at which cycles of work are required to operate and the degree of flexibility that can be required.

Language

When it comes to the skill sets required to successfully engage with the business and other external communities, by far the most daunting aspect of academic institutions to the general public is the closed jargonistic language. In particular, the love of TIAs - Totally Incomprehensible Acronyms! We even have, in fairly regular use: 'TLA', meaning 'Three-Letter Acronym'. Nothing can be more calculated to disengage potential partners than the use of language that they cannot understand. It generates a sense of being excluded or, worse, of being talked down to if they have to keep asking for terms to be explained. After a short while it raises resentment and levels of anger and temper. The Embedding BCE project spoke to several members of the business and community sectors (who had engaged with institutions outside of the five project partners) and the subject of language was mentioned forcibly by several individuals.

It was also pointed out that a large number of small to medium enterprises are managed and staffed by people who may never have been to university and that the thought of having a meeting with a 'Dr' or 'Professor' can be a daunting prospect. Again the main fear is that the language used will not be understandable. The successful practitioner will be one who is able to make people feel at ease very quickly and who speaks in a common language.

[8] http://www.jwheatley.ac.uk/aboutcollege/haghill.html

[9] http://www.myerscough.ac.uk/library

Background Knowledge and Empathy

Realism and understanding should be shown when an institution is asked to help solve a problem for a company. One large pharmaceutical company was astounded when a university it had approached for consultancy suggested a solution that would take twenty years to achieve payback - in a discipline that has seen increasingly rapid advances over the past few decades.

Whilst academic staff working in a particular discipline may have extensive knowledge and skills, they need to be able to apply that to the commercial imperatives that companies are faced with.

Marketing

Whilst the marketing of courses, services etc. outwards to potential markets was found to be quite strong, the gathering of marketing information to inform future provision or areas for research was more sporadic and less well organised. In the sense of large-scale national or internationally strategic drivers, the senior management of institutions were able to promote priority areas with a high degree of awareness found within the practitioners of the institution.

Understanding of the drivers affecting a particular industry, for example, in order to inform curriculum development was dependent on strong Knowledge Exchange partnerships and an active role played by staff of the institution in order to identify and bring back the relevant information.

We have already discussed in the section on Use of Information Systems that the main expectation of a Customer Relationship Management (CRM) system would be that it could help cut down on the number of meetings attended by two or more members of institution staff. Yet if that were to prove truly advantageous it would require much more effort to be applied to internal communications within the institution.

Internal Communications and Engagement

There are two main barriers to the successful dissemination of information and knowledge brought into an institution by an individual staff member.

1. knowing who else has a need of that information or knowledge

2. the availability of an intuitive, accessible and easily navigated repository of such knowledge

There was evidence in all of the Embedding BCE project partners that there was a lack of complete knowledge about the activities of other areas, departments, faculties, institutes and teams. This manifested itself in embarrassment at finding colleagues attending the same meeting, in low internal take-up of available places at conferences hosted by the institution, and in some duplication of tasks or activities.

However, to an extent some of this is unavoidable and to solve it would be to have discovered the panacea that all organisations dream of. Communication methods such as email, newsletters, intranets, social networking, poster campaigns etc. are dependent for their success on the willingness and ability of people to find time to go looking for them.

A review of Business and Community Engagement will test for internal communications strategies and their effectiveness.

Costing Mechanisms and Value of Intellectual Property (IP)

The Embedding BCE project identified the need for a consistent approach to costing work and pricing the licensing of IP for exploitation by others. In some partners this was provided by a centralised resource, such as the Research and Enterprise Services team at Keele University. This service was shown to be valued by the majority of its users and was an example of providing a centre of expertise within the institution.

We have mentioned elsewhere the need for flexible approaches and a more commercial attitude to costing and securing payments that may challenge traditional financial approaches. Again, the existence of a centralised resource to aid in the decision-making process would ensure a fair and consistent approach to the evaluation of any extenuating circumstances that may arise with a commercial partner or customer.

Performance Measurement

There are a number of reasons that institutions measure what they do.

- to justify funding
- to monitor quality of provision and service
- to monitor effectiveness and efficiencies
- to assess impact of activities on a range of factors
- to demonstrate value
- to inform decision-making

Resources and Links

"The National Co-ordinating Centre for Public Engagement [NCCPE] highlight seven 'dimensions' where engagement is known to 'make a difference' and for which measurement tools exist or are in development."

Public access to facilities

Public access to knowledge

Student engagement

Staff engagement

Widening participation

Encouraging economic regeneration

Institutional commitment

- NCCPE: https://www.publicengagement.ac.uk/what-public-engagement/measuring-impact

A review of Business and Community Engagement in an institution should seek to understand the measurements, targets and attainments being monitored and their purpose, any gaps (and reasons for them) between the required and actual figures and whether the measurements being taken inform future activities and deployment of resources.

HEFCE, through HESA, gather data relevant to Business and Community Engagement via the **Higher Education - Business and Community (HE-BCI) Survey**[10].

This provides data on engagement activities to different types of community and separates specifically:

- research-related activities
- business and community services
- regeneration and development programmes

[10] http://www.hesa.ac.uk/index.php?option=com_content&task=view&id=1502&Itemid=233

- Intellectual Property
- social, community and cultural engagement

Much of the data gathered for the return is directly useable by institutions to monitor themselves as an institution. However monitoring of individual projects, programmes and activities can help inform the resourcing and efficacy of activity.

Measuring Participation

By far, the most widely measured indicators identified by the Embedding BCE project were participation rates. Museum admissions, meetings attendance figures, CPD students taught, conference attendance, number of students placed, number of Knowledge Transfer Partnerships etc.

These quantitative measures give some idea of the number of people who have engaged with the institution, but no qualitative data such as whether they thought the experience worthwhile or whether it led to an impact on their workplace, or within their local or regional community.

In some instances interviewees of the project were able to point to repeat business from employers, although this in itself cannot necessarily provide evidence of any qualitative evaluation by the company.

Qualitative Measurement and Impact

There was a widely accepted perception that attempting to gather qualitative data from participants was time-consuming, expensive and led to small returns of useful data. Surveying participants immediately following the end of an activity produced data on whether they enjoyed the activity and thought it worthwhile and could also gather data on what they hoped to do differently as a result of having taken part. However, collecting data on whether there was any actual impact due to changed behaviours required work that most practitioners felt was not justified by the results of any survey. Lack of changed behaviour was not necessarily felt to prove any failing of the activity, being highly dependent on participants' own circumstances, self motivation and opportunity, yet could easily be construed by others as being symbolic of some shortcomings of the activity.

Measuring eventual impact within communities was fraught with difficulties due to there being necessarily long time intervals between, for example, increased efficiencies or the introduction of new procedures due to training of clinicians or clinical managers and measurable effects on the health and well-being of a community. Another factor affecting the ability to prove connection to cause was the number of other factors that might contribute to such an effect after a number of years.

Customer Perception

Repeat business is one way of measuring customer perception, but it doesn't actually give very much in the way of information. It shows that no one has actually said in a convincing way 'Don't use this supplier again...' but apart from that, anything else is an assumption.

Surveying delegates directly at some point after a training workshop or course can be fraught with potential misunderstanding. If delegates are aware that they are attending a course or training event taught by the institution then they may be willing to give feedback. Where the course seemed (to them) to have been arranged by their own employer, a survey asking them questions about a university or college course can cause them to either throw it straight in the bin or send it back marked 'I haven't been on such a course'.

As an example from our own experience: JISC infoNet runs many one-day workshops. A sizeable proportion of these are offered regionally by the JISC Regional Support Centres (RSCs) to institutions. Delegates as a norm identify with having attended (or having 'been sent on') either an 'RSC course' or more simply a 'JISC course' no matter who actually delivered it or how clearly they tried to say where they were from. Receiving a survey several months later that says 'Our records show you attended a JISC infoNet event...' isn't always met with recognition.

However information given freely some time after an event is the most robust data in terms of evidence of impact. In obtaining such data, institutions will score where they have:

- flagged to delegates or participants that they may be surveyed at some point in the future - this means that they have a better chance of linking the survey to the course or event
- asked questions in such a way as to reassure people their responses are not just a box-ticking exercise - e.g. given examples as to how their data will be used
- made efforts to make the sending of data as straightforward as possible - e.g. by including links to online surveys rather than a URL that must be typed, and by keeping surveys reasonably short and using tick-box answering as much as possible whilst allowing extra comments to be made in text for added value
- given some incentive to complete the survey - it could be a place in a prize-draw, but it could equally be to have the opportunity to have a say in how future events are shaped
- acknowledged a data return - a short word of thanks and/or a list of the person's responses as a record if they want to keep it, is far better than just reaching 'The End'

Disclaimer