Managing Placements with IT and Online

Good Practice for Placements Guides – Volume 1

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INTEGRATING WORK AND LEARNING

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1 Terms of Reference

1.1 Background

In recent years the issue of managing placements using IT has been high on the agenda during ASET events, with a number of institutions showcasing their in-house systems for our members. These systems were widely appreciated and it became apparent that there was a greater need to consolidate the knowledge of those individuals producing these systems for the benefit of all members.

1.2 Scope

This guide can be used to aid the design of in-house IT systems to manage any period, location or type of placement from year-long sandwich placements, to shorter module linked placements, to three month internships overseas. It should be noted that the flowcharts have been much simplified in order to be optimally accessible to the widest possible readership.

Much of the specification may also be adopted for professional practice placements, like Nursing and Teaching, although it is appreciated that there would also need to be an adherence to national/centralised external electronic systems.

1.3 Purpose and Desired Outcomes

The purpose of this document is to provide a guide which displays the ideal IT system for placement management, taking into account the Quality Assurance Agency (QAA) and ASET Codes of Practice. The QAA's section 9 'Work-based and placement learning' is referred to within this document however other sections (3-7) should be consulted more widely when reviewing practices. This document is meant to act as a reference foundation from which individuals and institutions can either enhance and improve their own existing systems or develop and implement their own new systems. It is not intended to be design-restrictive, but simply exhibit the current IT possibilities.

1.4 Target Readership

This document is meant to be useful to university and college staff specifically involved in the administration and management of placement learning who wish to improve upon or create 'good practice' placement management IT systems.

2 Introduction

Managing placements well is a time consuming activity. There is a lot to be done. Working with students, working with academic staff, working with placement providers and more. A serious problem is that the "more" is the most time consuming, and probably the most boring and least rewarding. That is because the process of taking a placement vacancy and manually bringing it to the attention of students, whether by notice board, website, or email, and collating and dealing with responses, takes a lot of time. It's also slow and inefficient.

Increasingly, people are turning to technology to solve some of these issues, since computers are good at boring repetitive tasks. We are not suggesting that technology replaces a human placement co-ordinator, far from it. The analogy we might use is that technology can be like cruise control in a car, it takes care of one issue, but one can't hop into the back seat for a nap once it is turned on.

The guiding principles here, for any technological aid, should be:

1. using computing power should make no task more tedious and make many a great deal less tedious;
2. software should support processes people use or want, rather than enforcing change simply because an existing process can't be accommodated;
3. it should be easy for stakeholders to access the software at any time, from anywhere;
4. it should be scalable, it needs to work well for 20 students or 2000 students;
5. it should be adaptable for changing needs in the future; and
6. that this freeing of time and resources can then be better spent on the *real* business of placement coordinators – dealing with the students, staff and placement providers.

The first two principles are very important, it is all too easy to create software that fails to understand the real processes and so impedes them rather than facilitating them. That brings us to the purpose of this document which is, given that we agree that technology *might* help placement co-ordinators, what processes should it take into account?

There is a real diversity of practice in the work-based learning arena and any technological solution has to be built around this. Again, our second principle says that if technology can provide access to a process that is desired but was previously impractical, so much the better, but it should *not* force professionals that understand their discipline to adopt a process simply because it works for someone else.

Therefore all the charts given here reflect processes that may or may not be appropriate for a given arena; they should be regarded as a menu from which to pick, as needs dictate, and they are intended to be aspirational too.

2.1 Resources Required

What kind of computer hardware is required to support such a venture into technology? Surprisingly little. The University of Ulster ran their solution, OPUS,[1] on an old computer[2] for several years, supporting thousands of users. Today's modern desktops are perhaps at least 15 times more powerful. So the kind of machine often discarded as too slow and old for everyday use could be ideal for such a venture, or at least for piloting.

What kind of software is available to build upon? If it is agreed that a solution should operate 24 hours a day, seven days a week and be accessible from anywhere, then the obvious solution is to use the Internet, or the World Wide Web.

A great quantity of the software that runs the infrastructure of the Internet is called *Free Software*. In this context, we do not mean software that is free of charge, but "*Free as in Freedom",*[3] or software that grants the following four freedoms or rights:

1. the right to run software for any reason;

2. the right to study and adapt the programme as needed;

3. the right to distribute the programme to others;

4. the right to release improvements.

So this is an extension of the ideal of "*Open Source*" that grants the right to study a programme, but not *necessarily* any of these other rights. But why should anyone care about this?

Many public sector bodies, including governments (and for example the EU) are beginning to realise that such software can bring considerable savings (since "right" number 3 usually guarantees that the software is also free of charge) and that, crucially, such software allows them to know *exactly* how their data is stored and what is being done with it, so they retain complete control over it. Proprietary programmes on the other hand tend to lock customers into their programmes indefinitely, since they need the next version to read their own data and one can never know for sure exactly what it does with the data.

So happily it is possible to obtain such software to help build a technological solution, including

- Linux, or more fully GNU/Linux, a free operating system;

- Apache, the world's most popular web server;

- MySQL, an excellent database programme;

- PHP, an excellent scripting language.

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1   See the OPUS development site at http://foss.ulster.ac.uk/projects/opus
2   A pentium pro 200 MHz for the interested, with 64Mb of RAM.
3   See the Free Software Foundation, http://www.fsf.org for more details.

This collection is so popular that programmes built on these technologies have a name: LAMP applications (from each initial letter). Of course alternatives exist for all of these and it is (for example) possible to run such software on Windows instead of GNU/Linux. However, all of this software can run on older equipment that one might imagine and it means it is possible to start with free technologies that grant a lot of rights.

2.2 DIY or Off The Shelf?

The flowcharts presented here are intended to allow you to see if your process could be supported by them. Perhaps the flowcharts do too much in places, in others they do not go far enough. Obviously they will be superseded as technology moves on in the future.

When a satisfactory set has been arrived at, what next? Is it best to build a custom system, or use an existing system?

DIY – Building a Custom Application

The issues here are that:

- √ the product should exactly match all internal processes and statistics;
- √ there will be a deeper institutional knowledge of how it works;
- √ it might be simpler to integrate to a PDP system already in use;
- ✗ it will be costly, in terms of effort and time. Expect at least one person year's worth of work to get something credible;
- ✗ a poor choice of developer could easily increase such a time schedule;
- ✗ there will be no external help in maintenance, or easy dissemination of good external ideas;
- ✗ all associated resources need to be produced too.

Off the Shelf – Using a Proprietary Application from Elsewhere

Buying a proprietary product might make trouble in the long run:

- √ it does remove the "hassle" of developing a custom product, but:
- ✗ if the developers go bust, or discontinue the product, there will be few recovery options since they retain all rights to the product;
- ✗ it could be a poor fit for the processes;
- ✗ new features and bug fixes will be entirely at the discretion of the developers;
- ✗ it might not integrate well with a given student records system.

Off the Shelf – Using a Free Software Application from Elsewhere

There are free alternatives that already exist. At this time the University of Ulster have made their placement solution, OPUS, and its PDP sister, the PDSystem,[4] free software. Hopefully more will follow:

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4   See the PDSystem development site at http://foss.ulster.ac.uk/projects/pdsystem

√   products (OPUS / PDSystem) already exist and are in use;

√   they are the product of around 4+ years of experience and development from a team of Placement Tutors, with at least 6+ person years of labour;

√   they should be fairly adaptable to any processes;

√   institutions that use them will hopefully form a community to share practice, documentation and code;

√   some resources will already be available;

√   institutions can fix problems and enhance code themselves *if they wish to and the developers don't*;

✗   however, to get the best from them, some effort needs to go into syncing them with a given student records system.

2.3   The Way Forward

In summary then, this document is intended to help promote discussion about how, where and when information technology might be a useful aid in the practice of managing work-based learning. It is intended to sit somewhere between current "state of the art" and an aspiration of what is a current goal, since several programmes implement some of this functionality, yet probably no existing product implements each and every step of these charts.

As we as a community move further along this path we will find other tasks where technology can help, and find out where it does not help so much and why. So we can expect that we will outgrow this document, and perhaps produce another version of it in the future, but for now we hope it provides information on what can be done, how, and why we want to see things go forward, in the short term at least.

3   Flowchart Series and Endorsing Text

The following flowcharts are colour and shape coded as defined in the key below to further aid a wider variety of readers' understanding:

Student Action

System Process

Administrator Action

Manual Input

Placement Provider Action

Decision

Automated System Action

Manual Operation

Academic Action

3.1 Student Registration

Student enrolled on placement scheme?

Yes   **No**

a) Student details uploaded from central system

b) Administrator inputs student details

c) Student record created

d) Single sign on?

No

Yes

e) Issue username and password
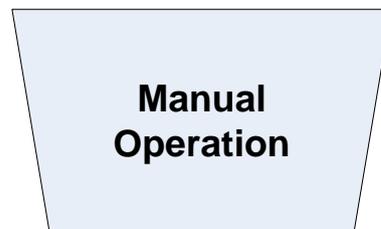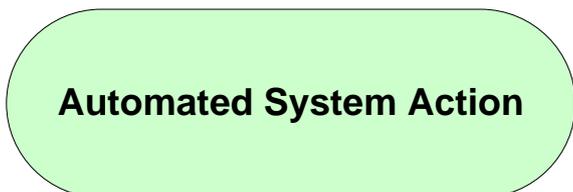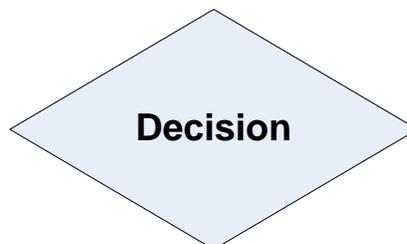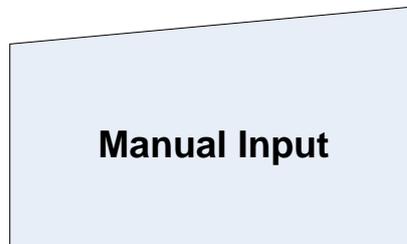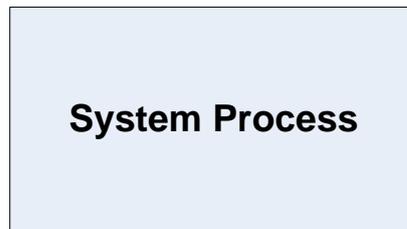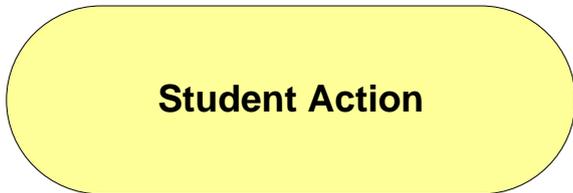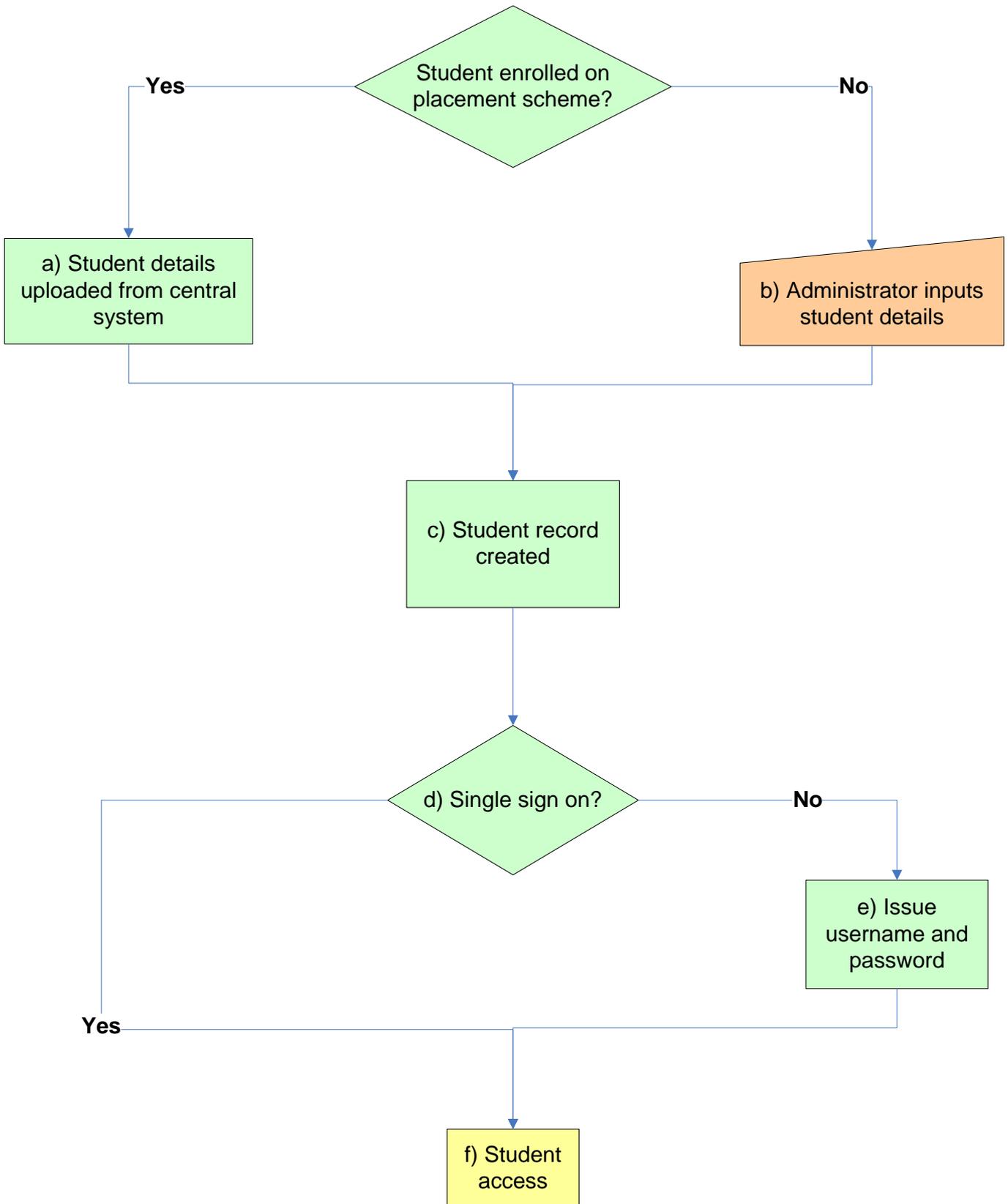
f) Student access

3.1 Student Registration

All students can be directed to the on-line placements management system (website).
Prior to registering they could have access to the following information:[5]

- CV design tips
- Interview technique tips
- University staff contact details
- Case studies
- Support and guidance information (including disability assistance)
- Events and news
- Placement exemption guidelines (procedures and forms)

There are 2 possibilities for the creation of a placement student record:

a) Student details can be uploaded from the university's central records system.

b) Administrators can manually input the student's information.

Once the placement student record is created c) and verified to ensure there are no duplicate records d), a 'Timeline' (example shown on page 17) appears to graphically track and summarise applications made by the student.

e) A username and password are issued to the student. The username and password usually comprise of the student's university email address and registration number.

f) With a username and password the student can now have access to the following information:
-Targeted announcements
- CV builder(s)
- List of placement agencies (e.g. BUNAC, STEP, Talent Ladder etc)
- Academic Tutor's details
- Exemption procedures
- Archived student projects/posters etc
- Information and resources (e.g. preparation programme, stakeholder rights and
   responsibilities etc)
- Archived vacancies
- Current vacancies

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[5] QAA Section 9, Precept 5: "Awarding institutions ensure that students are provided with appropriate and timely information, support and guidance prior to and throughout their work-based and placement learning"

3.2 Placement Provider Registration, Placement Posting & Approval

Registered?

No

a) Placement provider registers

b) Single sign on?

Yes

No

Yes

c) Issue username and password

d) Placement provider access

e) Placement details input

f) Is placement acceptable?

Yes

No

h) Placement activated

g) Placement provider's record noted
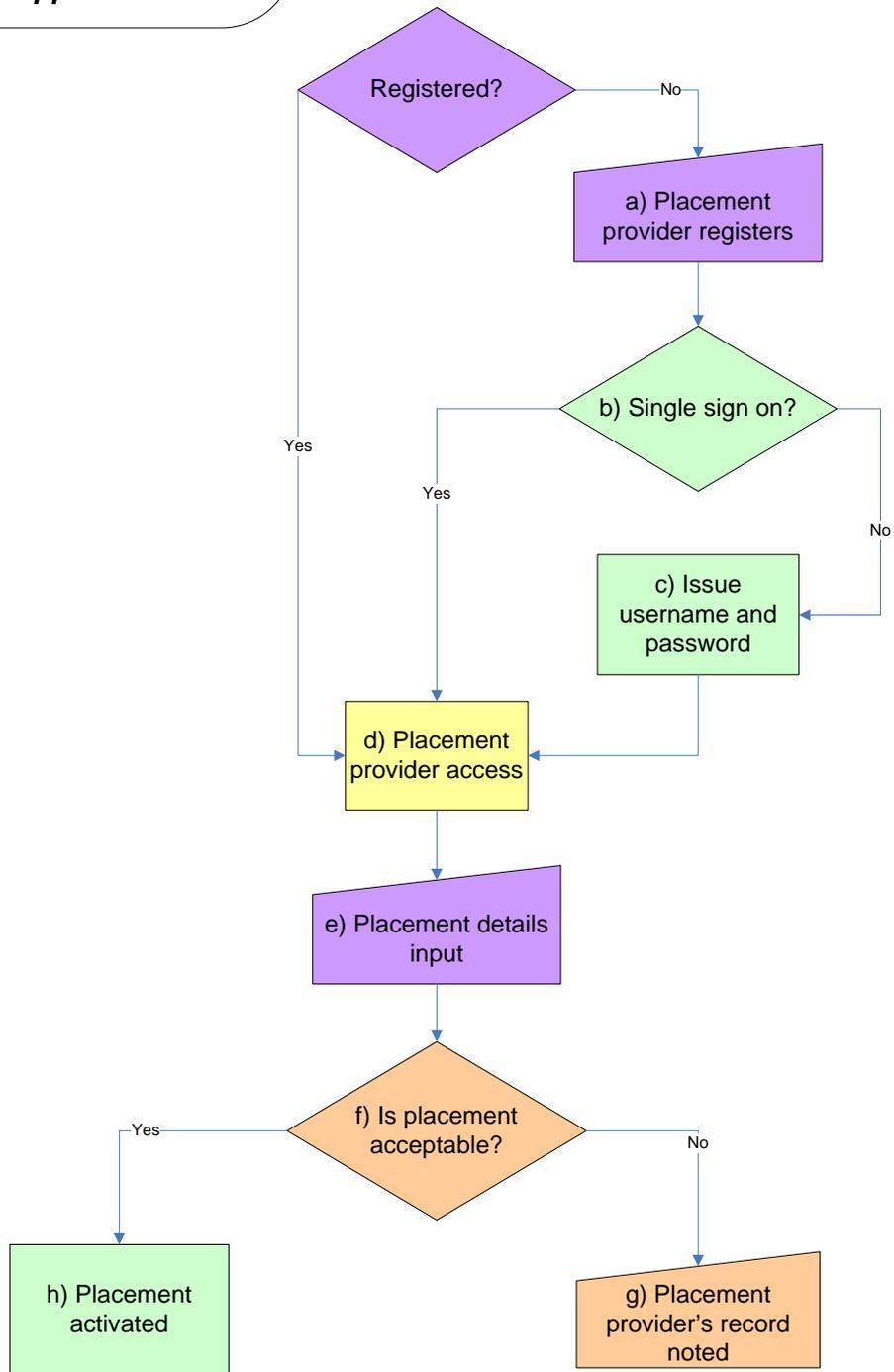
3.2 Placement Provider Registration, Placement Posting & Approval

If a placement opportunity is sourced, placement providers can be directed to the on-line placements management system (website). Prior to registering placement providers could have access to the following information:

- Overview of placement process
- Recruitment technique tips
- University staff contact details
- Case studies
- Event and news

a) Placement providers manually input their organisation and personnel information (supervisor name and contact details etc).

b) The placement provider's record is then created and verified to ensure there are no duplicate records.

c) Placement providers are asked to create their own username and password.

d) With a username and password the placement provider can now have access to the following information which remains accessible throughout the placement lifecycle:[6]

- Targeted announcements
- Academic Tutor's details
- Information and resources (e.g. job description templates, stakeholder rights and responsibilities in adhering to Precept 3 of the QAA Code of Practice Section 9[7]
- Archived vacancies
- Current vacancies

e) Placement providers input their own placement vacancy details into a template which allows attachments e.g. PDF and Word files.

f) The placement vacancy is held in a file awaiting approval. The system can operate with several layers of access e.g. Placement Manager (capable of approving vacancies for instance) and Placement Administrators who have lower level access etc.

g) The placement vacancy is not approved and the placement provider's record is noted.

h) The placement vacancy is approved[8] and the vacancy is activated between specific dates.

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[6] Precept 6: "Awarding institutions assure themselves that work-based and placement learning partners are provided with appropriate and timely information prior to and throughout the students' work-based and placement learning."

[7] Precept 3: "Awarding institutions assure themselves that work-based and placement learning providers know what their responsibilities are."

[8] Precept 2: "Awarding institutions have in place policies and procedures to ensure that their responsibilities, and those of their partners, for work-based learning and placement learning are met and that learning opportunities provided are appropriate."

3.3 Student Placement Search

a) Input criteria for initial search

b) View placement details

No

c) Save search criteria?

Yes

d) Automated search sends appropriate alerts when new placement advertised
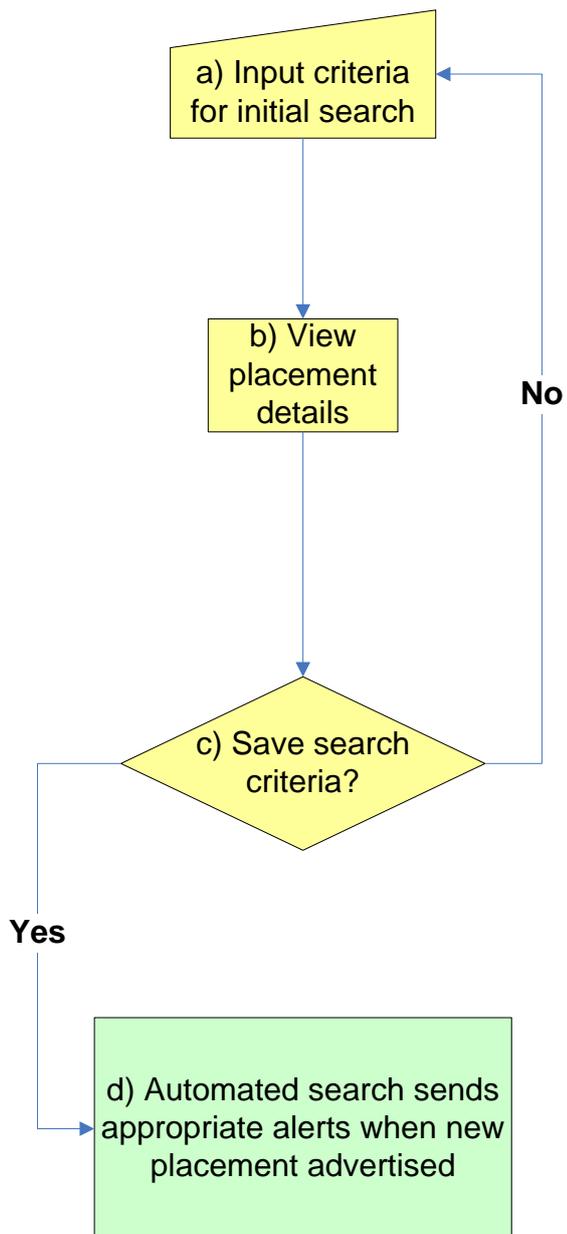
3.3 Student Placement Search

a) Whilst undertaking an initial vacancy search, students can search using the following criteria:

- A-Z of placement provider names
- Date (placement posted today, closing date today, last week to apply etc)
- Discipline / subject (pre-defined drop down list)
- Vacancy title
- Duration and mode of placement (full-time / part-time, year-long, 2 weeks, voluntary etc)
- Location
- Keyword search
- Salary

b) Students view a placement vacancy in a standardised pre-defined format, but placement providers have the option to attach documents e.g. PDF or Word files. Standard vacancy details could include:

- Link to placement provider's website
- Method of application (including application form where appropriate)
- Salary
- Closing date
- Job description or project outline
- Placement provider's archived vacancies and student case studies

c) Students have the option to save search criteria, but if they do not wish to, a fresh search can be undertaken each time they log on to the system.

d) The automated searches will display filtered vacancies which can be viewed on the student's record when logged into the system.

NB: Whether a student has pre-defined search criteria or not, all vacancies current and archived can be viewed once a student is logged onto the system.

3.4 Placement Application

Placement received on-line?

Yes

No

No

a) Apply on-line

b) Apply manually / independently. Record application

d) Monitor application status & update profile

c) Admin notified by email of application to commence approval procedure

e) Placed yet?

Yes

f) Student record barred from further applications
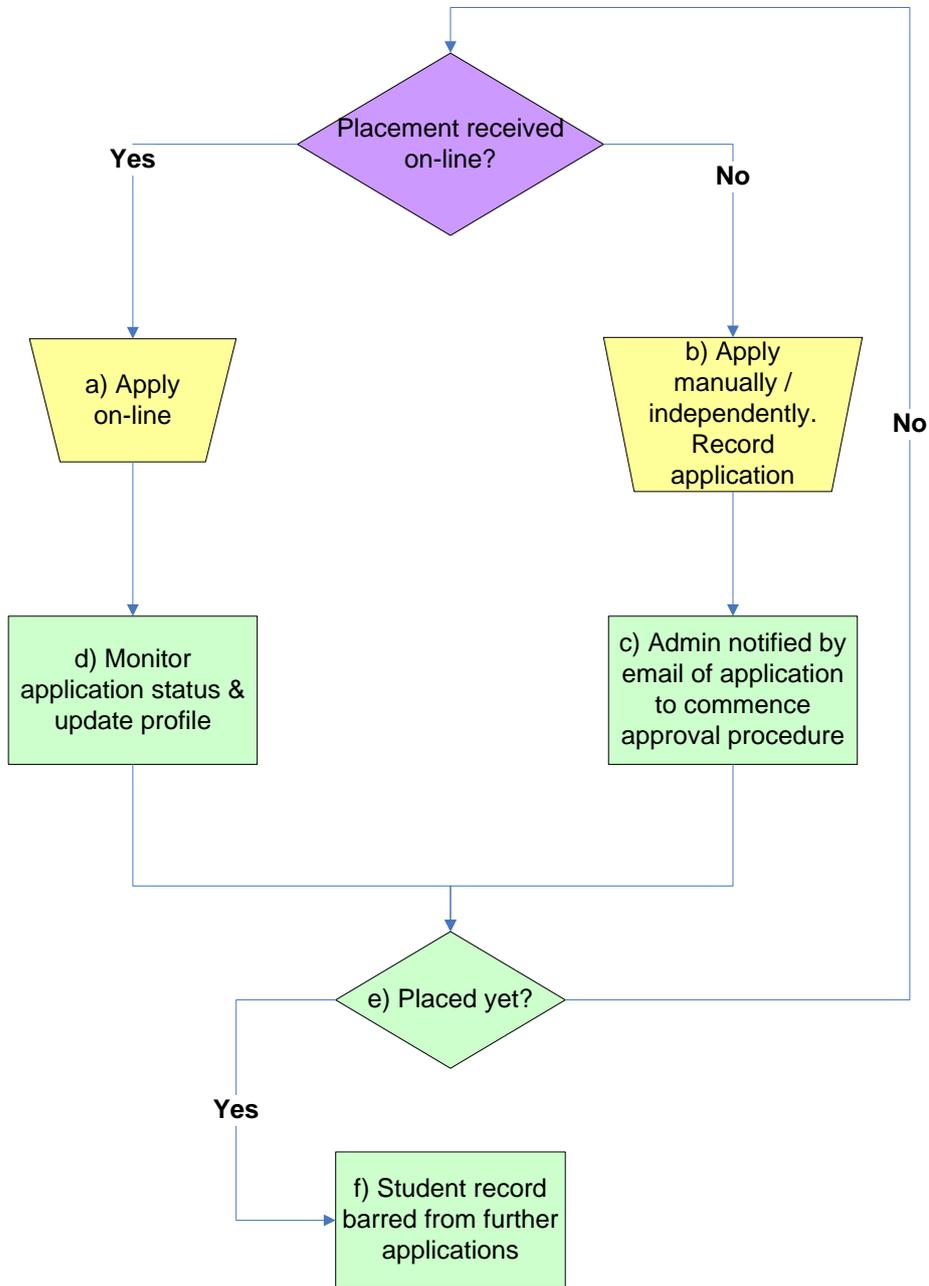
3.4 Placement Application

Placement providers may receive applications in a variety of ways:

a) On-line through the university system, or

b) By manual / independent application as follows:

- Direct to the placement provider on-line

- Hardcopy application form

- Email applications collected by university

- Email applications collected by placement provider

- Speculative application by CV and covering letter

- A student may wish to conduct a period of approved self - employment

Any of the above methods of application will require the student to log on and update their own record with applications made or details of self-employment.

c) These manual or independent applications will then need to be approved. The system will send an automated email to the administrator.

d) On-line applications through the university system will automatically update the student's record with 'application made' details.

e) The system will monitor the status of the student's record. Reports can be generated to identify students not yet placed etc.

The student's 'Timeline' (see below example) will automatically update with lines when applications have been made, whether the details are input manually or automatically.
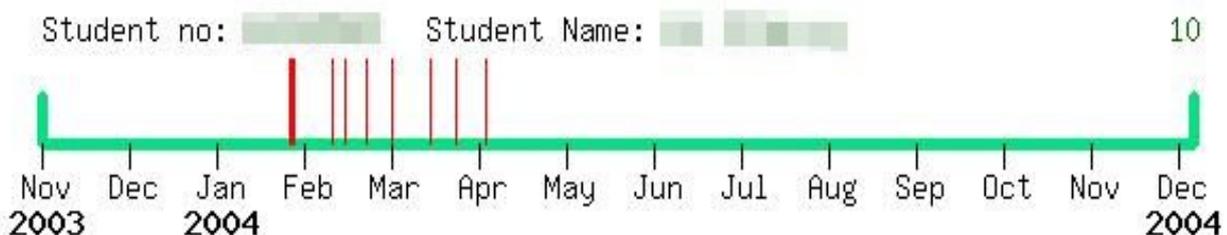
Fig 1: Timeline featured in 2005 ASET workshop 'Managing Placement On-Line' by Dr Colin Turner, Dr Gordon Crawford, Mr Damian McGivern and Mr Ronald Laird.

f) If the student has accepted a placement then their record will be barred from further applications.

3.5 Student Selection

a) Applicants?

Yes

No

c) View or record applicants

b) Placement provider's record noted

d) Interview?

Yes

No

f) Record applicants interviewed

e) Feedback to student

g) Offer placement?

No

Yes

h) Student accepts?

No

i) Student record updated by placement provider

Yes

j) Student record status to placed

k) Placement status to filled

l) Student record barred from further applications
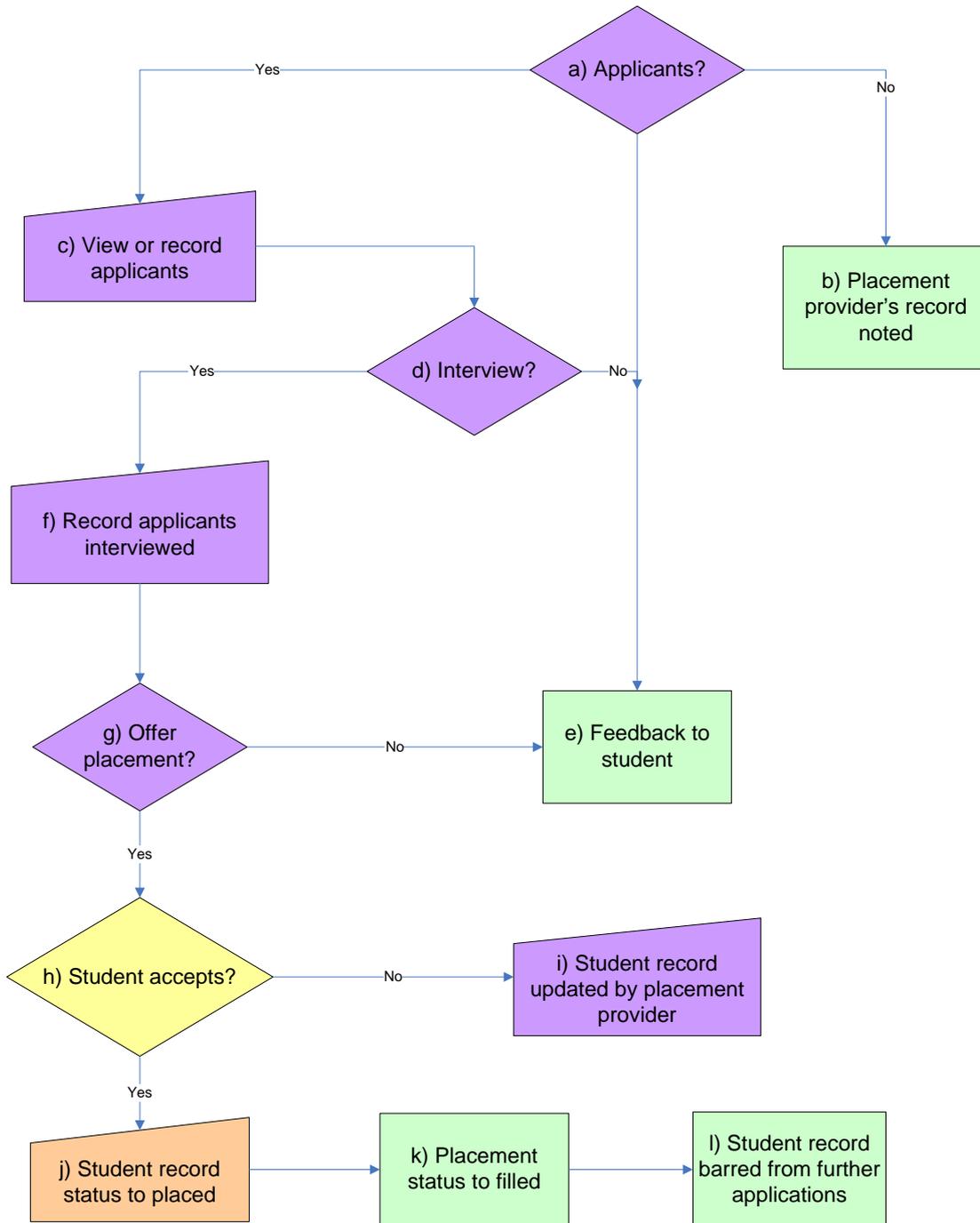
3.5 Student Selection

a) Once the closing date expires the placement provider can be notified and prompted to log on to the system to view applicants.

b) If there are no applicants the placement provider's record will be noted. The placement provider may then extend the closing date or amend the placement vacancy details accordingly.

c) If there are applicants, the placement provider can view the applications or record applications if the method of application was manual or independent.

d) The placement provider will then decide whether to interview any of the applicants.
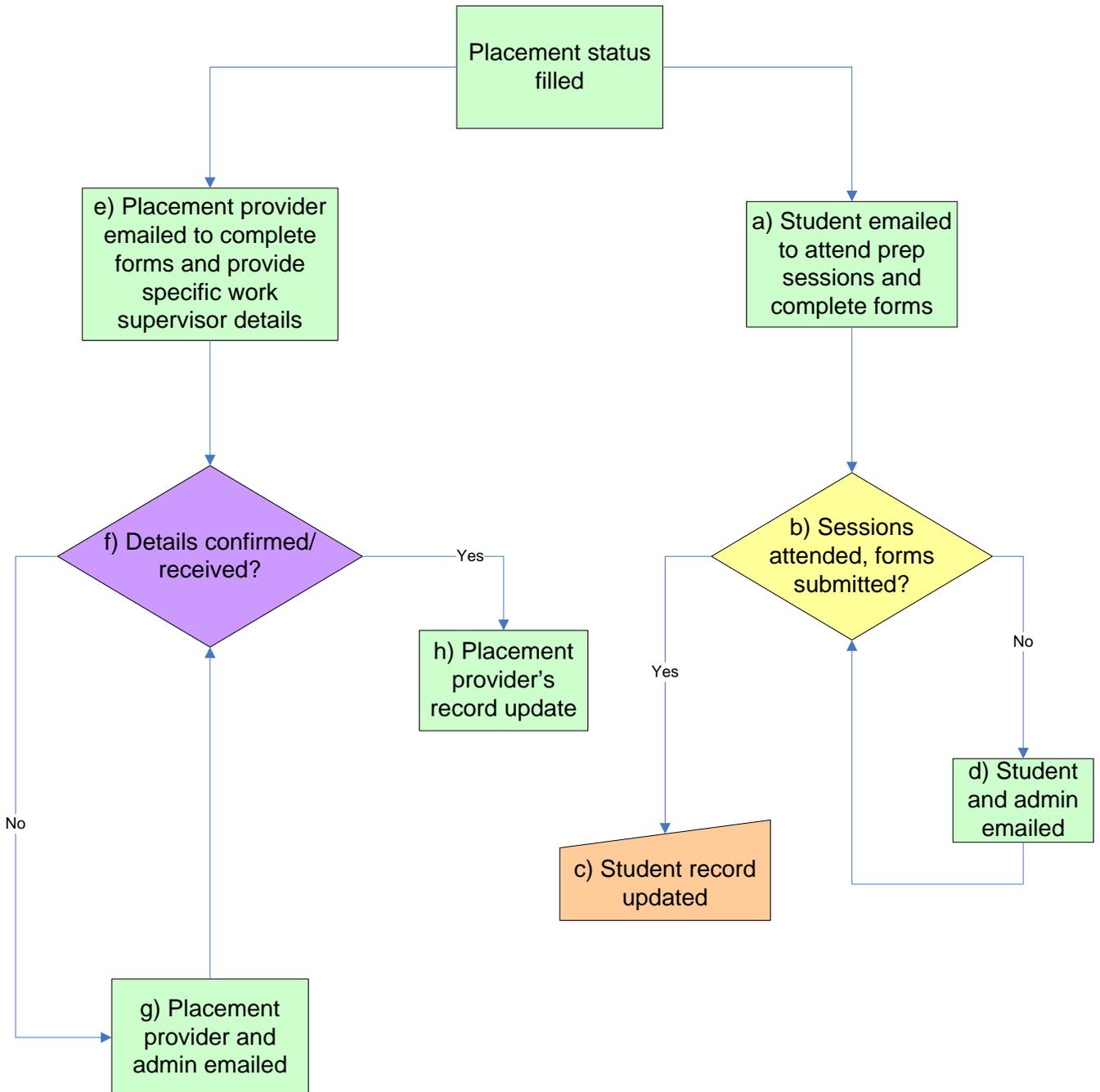
e) If none of the applicants are short-listed for interview the system will generate an email notifying them.

f) The record of those applicants short-listed to be interviewed will be updated by the placement provider.

g) The placement provider will interview and ascertain if any applicants should be recruited for the placement.

h) The successful applicant will be notified and will decide whether to accept the placement.

i) If the student does not wish to accept the placement offer their record will updated by the placement provider.

j) University staff will update the student's record should they accept the placement offer.

k) The placement vacancy status will change to 'filled'.

l) The student's record will be barred from further applications and their timeline changes colour.

3.6 Placement Preparation

Placement status filled

e) Placement provider emailed to complete forms and provide specific work supervisor details

a) Student emailed to attend prep sessions and complete forms

f) Details confirmed/ received?

Yes

h) Placement provider's record update

b) Sessions attended, forms submitted?

Yes

No

No

c) Student record updated

d) Student and admin emailed

g) Placement provider and admin emailed

3.6 Placement Preparation

Once a placement vacancy has been filled, in accordance with the QAA Code, all stakeholders should be appropriately prepared. This can be achieved effectively through standard systemised practice.

a) Students are emailed automatically by the system to attend preparatory sessions and submit the required forms. Preparatory sessions could include the following information and remain accessible throughout the placement:[9]

- Health and safety information, including risk assessment guidance
- Emergency procedures information
- Assessment details
- Cultural awareness guidance
- Disability / support services information
- Overseas advice (travel and medical)
- Finances, fees etc

The above list can be shown as a checklist in the student record which the administrator will manually update as the student submits the forms.

b) The system will monitor attendance at preparatory sessions and the submission of forms.

c) Once the student attends the sessions and submits the forms their record can be updated by the administrator.

d) If the student does not attend the sessions or submit the forms the system will send an automated message to the student and administrator.

e) Simultaneously the placement provider will be automatically emailed to submit the specific contact details of the student's work supervisor.

f) The system will monitor the submission of placement provider details.

g) If the placement provider has not submitted the requested information the system will send an automated message to the placement provider and administrator.

h) Once the placement provider submits the requested information their record is automatically updated, creating a new account, if necessary, for the individual supervisor allowing access to guidance, visits and assessment details.

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[9] Precept 4: "Awarding institutions ensure that students are made aware of their responsibilities and rights throughout their work-based and placement learning."

3.7 Placement Monitoring

a) Academic assigned to student

b) Academic prompted by email to log on for student/visit info

c) System visited?

No

Yes

d) Academic prompted to contact student

No

e) Visit arranged?

Yes

g) Academic prompted by email

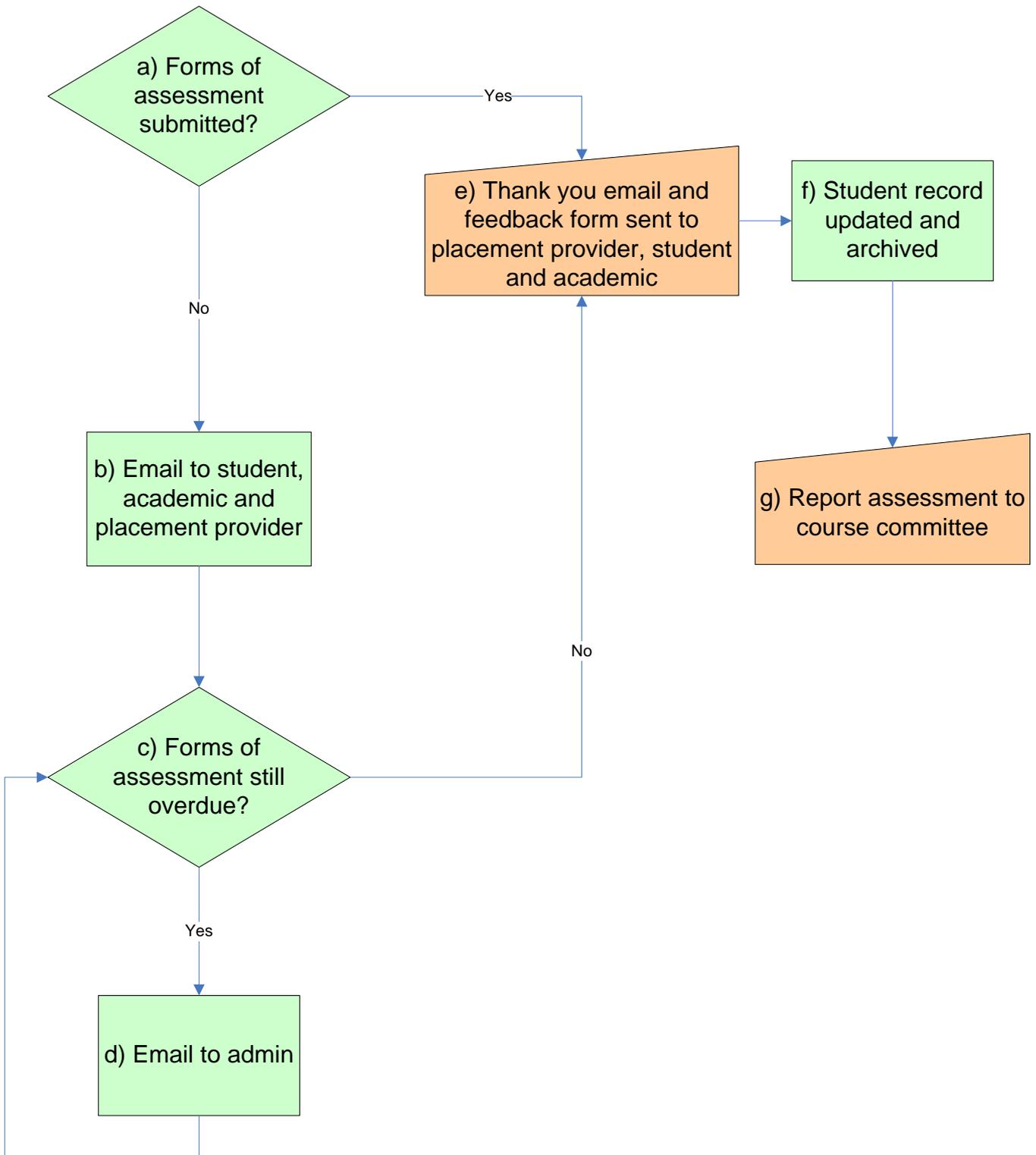No

f) Visit forms submitted?

Yes
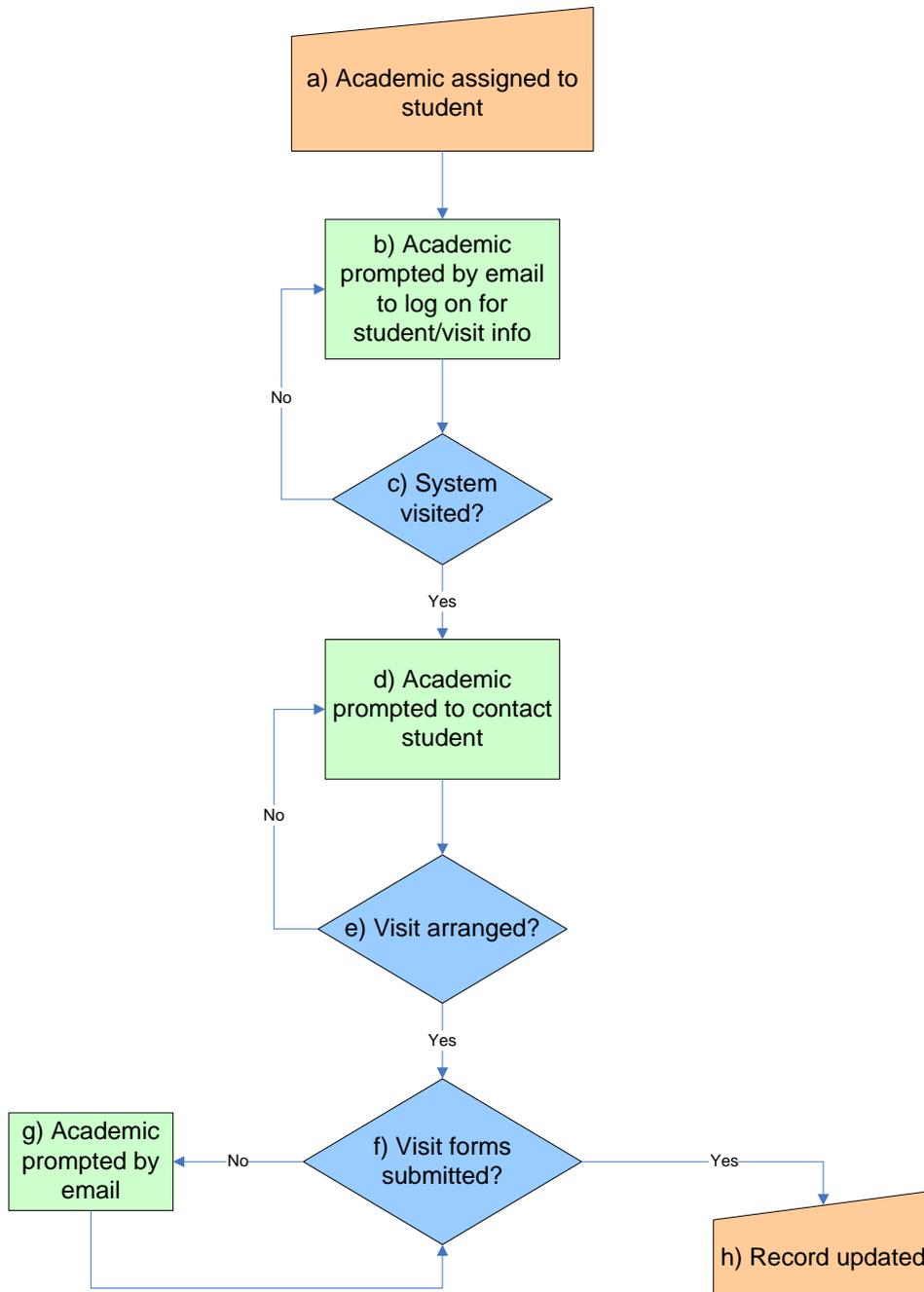
h) Record updated

3.7 Placement Monitoring

a) Prior to the start of the placement the student record is updated with the name of an appropriate academic who will supervise them during their placement. Drop down lists can be used for different disciplines, fed from a central database of academic staff.

b) The academic will be automatically prompted by email to log on to the system to access student support and visits information.

c) The system monitors whether the academic has logged onto the system.

d) Whilst the academic is logged onto the system they will be prompted to contact the student to arrange a visit. The visit date will be noted on the system.

e) If a visit is not arranged within a specified period, the academic will be automatically prompted by email.

f) Once the visit date has expired the system will email the academic to submit the visit forms.

g) If the forms are not submitted within a specified period, the academic will be automatically prompted by email.

h) The forms may be submitted on-line in which case the student record will be automatically updated. But if the form is submitted in hard copy, the administrator will need to manually update the student's record.

NB: University staff should make regular contact with the students (and placement providers) by email, phone, video conferencing and visits. This monitoring can be captured in the student record or placement provider's record in a 'blog' section. Significant occurrences or correspondence can be input manually by the monitoring member of staff.[10]

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[10] Precept 7: Awarding institutions ensure that, where applicable, work-based and placement learning partners have effective measures to monitor and assure the proficiency of their staff involved in the support of work-based and placement learning."

3.8 Placement Evaluation & Assessment

a) Forms of assessment submitted?

Yes

No

e) Thank you email and feedback form sent to placement provider, student and academic

f) Student record updated and archived

b) Email to student, academic and placement provider

g) Report assessment to course committee

No

c) Forms of assessment still overdue?

Yes

d) Email to admin

3.8 Placement Evaluation & Assessment

a) All forms of assessment are requested within a specified period from students, placement providers and academics required to submit them.

b) Relevant stakeholders are automatically emailed should the forms of assessment not be submitted.

c) The system will continue to monitor the submission of assessment until records show a pre-defined complete set.

d) Should the forms of assessment still remain outstanding, the administrator is automatically emailed to make contact with individuals.

e) Once the assessment is completely submitted, all stakeholders are emailed with confirmation and thanks, together with a feedback form to identify any improvements that can be made to the placement process.[11]

f) The student record is updated and archived.

g) Administrators then report the assessment to course committees.

NB: Students' records can be updated with accreditation details, emailed to attend debrief and final year induction session and 'flagged' as an 'Ambassador' to speak to students being prepared for placement.

4   List of Example Management Reports

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[11] Precept 8: "Awarding institutions ensure that their policies and procedures for securing, monitoring and administering work-based and placement learning are effective and regularly reviewed."

Much of the time we are asked for information at a moment's notice. Your management system should have the capacity to generate standard periodic reports or to generate one off reports. Here is a list of the report title possibilities that the system could generate. This list is illustrative but by no means exhaustive:

- Complete student listing (last year, current year, next year)
- Student listings by course
- Students yet to attend a preparatory session
- Live placement vacancies, by company, location, salary etc
- Complete academic staff listing
- Students supervised by specific academic staff
- Employer's Liability Insurance due to expire in 2 weeks
- Students placed to date, listed by company
- Students placed in any given month
- Students still seeking placement
- Students exempt from placement
- Students withdrawn from placement
- Students who haven't made any applications
- Students yet to be visited
- Outstanding forms, assessments etc

5 Other Opportunities for Utilising the System

If we consider this system as a 'one-stop' shop for all stakeholders involved in placements, it is certainly worth initially considering utilising this 'space' for the following:

- Storing minutes from placement team or related meetings
- Storing placement conference reports
- Storing placement student award ceremony reports
- Listing university staff training opportunities, both in-house and URLs to external providers, such as ASET[12]
- Providing a staff 'blog' to communicate and capture innovations, developments, issues and solutions, ensuring that a standardised approach to placement learning, including a coherent assessment strategy is achieved. Such information can then be fed into academic management groups such as Teaching and Learning Committees, Faculty / Department meetings etc.[13]

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[12] Precept 7: "Awarding institutions ensure that their staff involved in work-based and placement learning are appropriately qualified, resourced and competent to fulfil their role(s)."

[13] Precept 1: "Where work-based learning or placement learning is an intended part of a programme of study, awarding institutions ensure that:
- responsibilities for academic standards and quality are clearly defined
- the intended learning outcomes contribute to the overall aims of the programme, and
- any assessment is part of a coherent assessment strategy"

6   Glossary

The variety and diversity of placements has grown substantially in recent years and with it the attributable terms. Therefore it is now necessary to define the terms this publication uses.

Staff – University employees who manage placements but who are not necessarily responsible for the assessment of the placement students, frequently referred to as Placement Managers / Officers / Co-ordinators.

Academic Tutors – University employees responsible for the assessment of students on placement. Academic Tutors may also co-ordinate or manage the placement process.

Placement Vacancy – An advertisement offering university-approved work experience which could be between 2 weeks and 1 year in duration.

Stakeholder – Any person, institution or organisation involved in the placement process.

Placement Provider – An organisation offering a placement vacancy. Organisations may include corporations, charities, the public sector and others.

In-House Systems – Systems developed within one's institution.

Sandwich Placements – A planned period of learning, normally outside the institution, at which the student is enrolled or generally engaged in learning, and where any learning outcomes are an intended part of a programme of study.

Module Linked Placements – Shorter periods of work-based learning, where a student may undertake a few weeks work from which they must evidence learning in order to gain academic credit.

Internships – A placement, frequently unpaid, in a commercial organisation working alongside paid employees.

Professional Practice Placements – A period of compulsory work experience as a pre-cursor to professional practice after graduation.

Codes of Practice – Reference point for institutions as they consciously, actively and systematically assure the academic quality and standards of their programmes, awards and qualifications.

Placement Co-ordinator – May also be known as Placement Officers, who are university staff responsible for the management of the placement process.

Placement Tutors – Academic members of university staff that may also fulfil the Placement Co-ordinators role.

Work-Based Learning – Learning which is integral to a higher or further education programme and which normally derives, in part, from experiences in the workplace.

Administrators – System users who are normally, but not necessarily exclusively, responsible for the tracking of placement information.

University – For the purposes of this publication; any academic institution, including some FE Colleges, offering work-based or placement learning opportunities.