Senatus Academicus
Wednesday 8 February 2023 at 2-5 pm
Hybrid meeting
Gordon Aikman Lecture Theatre and Microsoft Teams

AGENDA

FORMAL MEETING OF SENATE

SUBSTANTIVE ITEMS

1.	**Convener's Communications**	**Verbal update**
2.	**2.1 Senate Minutes** • Minutes of Senate meeting held on 12 October 2022 (open minute enclosed) • Report of E-Senate held from 11 – 25 January 2023 To approve	**S 22/23 3A** Closed minute circulated via email
	2.2 Matters arising • Report of Curriculum Transformation Programme costs [Minutes of 9 February 2022 meeting of Senate, Item 4] • Senate Standing Committees membership – outstanding issues – to be covered under Item 11, Paper S22/23 3K [Minutes of 12 October 2022 meeting of Senate, Item 5] • Update on discussions on the Sustainable Travel Policy [Minutes of 12 October 2022 meeting of Senate, Item 8] • Senate Exception Committee membership – expansion of membership [Minutes of 12 October 2022 meeting of Senate, Item 11] • Research Strategy Group update – report to UE on REF performance and funding [Minutes of 12 October 2022 meeting of Senate, Item 16]	**Verbal update**
3.	**Update on Externally Facilitated Review** To note	**Verbal Update**
4.	**Senate Standing Committees – upcoming business** To note and comment	**S 22/23 3B**
5.	**Senate Elections 2023/24 & Senate Standing Committee Elections 2023/24** To approve	**S 22/23 3C**
6.	**Curriculum Transformation presentation and papers** **6.1 Curriculum Transformation Framework** To support and endorse **6.2 Curriculum Transformation Project - Planning**	 **S 22/23 3D** **S 22/23 3E**

	To support and endorse **6.3 Senate Oversight of the Curriculum Transformation Programme** To note and approve	**S 22/23 3F**
7.	**Senate Role in the Response to People and Money Crisis** To note and approve[1]	**S 22/23 3G**
8.	**Supporting a Negotiated Resolution to Industrial Action as an Academic Priority** To approve	**S 22/23 3H**
9.	**Legal Context of Senate Motions** To note	**S 22/23 3I** **To follow[2]**
10.	**Honorary Degrees Withdrawal Procedure** To approve	**S 22/23 3J**
11.	**Senate Standing Committee Membership – outstanding membership items** To note and discuss	**S 22/23 3K**

ITEMS FOR FORMAL APPROVAL OR NOTING

12.	**Laigh Year Regulations** To approve	**S 22/23 3L**
13.	**Research Strategy Group update** To note	**S 22/23 3M**

Members attending the meeting in person are asked to please bring a device which allows them to access Teams for the duration of the meeting. Attendees are asked to please join the Teams meeting from their device at the beginning of the meeting.
Teams should automatically detect in-person attendees are 'in-room', however attendees are asked to please ensure their camera and microphone are switched off to reduce feedback. In-room microphones will pick up discussion.

Teams will be used to monitor quorum and to conduct electronic voting during the meeting.

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[1] Court has agreed that an external review into People and Money implementation should be instigated and will be considering and approving the commissioning, scope, and timescale of this review at its next meeting. This scope will include the impact on academic matters and comments previously provided by Senate. This is appropriate as the commissioning and associated costs of the review, and decision on handling of outcomes, sits within the scope of Court's powers rather than being a matter for Senate.

[2] Paper no longer coming forward to the meeting.

Senate

8 February 2023

Senate Minutes

Description of paper

1. The paper provides the open minutes of the Ordinary Meeting of Senate held on 12 October 2022, and a report of electronic business conducted 11 – 25 January 2023. The closed minutes of the 12 October meeting will be circulated to members via email.

Action requested / recommendation

2. For approval.

Resource implications

4. None.

Risk management

5. Not applicable.

Equality & diversity

6. Not applicable.

Communication, implementation and evaluation of the impact of any action agreed

7. Open Senate minutes are published on the Senate website: Senate agendas, papers and minutes.
8. Closed Senate minutes are circulated to members via email.
9. Papers related to meetings of Senate Standing Committees have been circulated via email to Senate members.

Author

Senate Secretariat
January 2023

Freedom of Information

Open paper

Senatus Academicus
Wednesday 12 October 2022 at 2-5 pm
Online meeting
Microsoft Teams
Unconfirmed Minute

Attendees: ADKINS Peter, ALIOTTA Marialuisa, ANDERSON Steve, ANDREW Ruth, ANWAR Mohammad, BAILEY Matthew, BARANY Michael, BAYNE Sian, BECKETT Chris, BENJAMIN Shereen, BLYTHE Richard, BOLAND Jose, BRADAIGH Conchur, BRADFIELD Julian, BRADLEY Laura, BRENNAN Mary, BROWN Aidan, BURLEY Sarah, BYRNE Lauren, CAIRNS John, CALVERT Jane, CAMACHO Pablo, CAQUINEAU Celine, CARBERY Anthony, CHALMERS Leigh, CHAN Annie, CONVERY Alan, COOMBES Sam, DAVIES Jamie, DESLER Anne, DESVAGES Charlotte, DUNSMORE Agata, EARLE Murray, ELEFTHERIOU Constantinos, ELLINGHAM Natalia, ENGLISH Andrea, EVANS Mark, EWING Suzanne, FISHER Bob, FRENCH Chris, GEBBIE Hope, GILFILLAN Stuart, GODDARD Benjamin, GOMES Miguel, GORDON Iain, GOTZ Manuel, GRAHAM Kim, GRANT Liz, GRATWICK Richard, GRAY Gillian, GUO Yong, HANSEN Tobias, HARRISON Tina, HAY David, HECK Margarete, HELBING Pia, HELGASON Thorunn, HENDERSON Sarah, HIGHTON Melissa, HILLSTON Jane, HOLLOWAY Aisha, HOPGOOD James, HOY Jenny, HUDSON Andrew, IBIKUNLE Gbenga, JAIN Aditi, JORDAN Crispin, KELLY Tobias, KENNY Meryl, KINNEAR George, KIRSTEIN Linda, LAURENSON Dave, LEWIS Steff, LIU Annie, LLOYD Ashley, LOVE Jason, LUGER Ewa, MACCALLUM Sam, MARSLAND Rebecca, MATHIESON Peter (Convener), MCCORMICK Alistair, MEIKSIN Avery, MORAN Carmel, MORLEY Steven, MORRIS Richard, MORROW Susan, MURRAY Lyndsay, NAVARRO Pau, NGWENYA Bryne, NICOL Robbie, NORRIS Paul, PATON Diana, PRESCOTT Sarah, RICE Ken, RILEY Simon, ROBERTS Niamh, ROLLE Sabine, SCHMID Marion, SCHROERS Bernd, SCHWANNAUER Matthias, SHAW Jo, SIMM Geoff, SKOWRONSKA Izabela, SMITH David, STRATFORD Tim, STUART Elaine, SULLIVAN Gavin, SYED Amer, TERRY Jonathan, THOMAS Robert, THOMSON Alex, TOWNSEND Rosemary, TRODD Tamara, TUFAIL-HANIF Uzma, TURNER Jon, TUZI Nadia, WALSH Patrick, WARRINGTON Stephen, WILLIAMS Isi, WÖHRLE Marie-Louise, WOOF Robyn, WYNNE Ben, YILDIRIM Alper

In attendance: DOCHERTY Sinead, DUFFIN Arlene, EVANS Lucy, HAYES Olivia (Clerk to Senate), KAYEMBE Debora, NICOL Kathryn, WARD Tom.

Apologies: ANDREANGELI Arianna, ARGYLE David, BOOTH Tom, BOSWELL Christina, BRANIGAN Holly, BUDD Adam, CONNOR Andrew, CRANG Jeremy, CRUZ Juan, DANBOLT Jo, DAWSON Karen, DEVANEY John, DIMARTINO Simone, DUNLOP James, EVANS Jay, FORBES Stuart, GILL Amrit, HARMON Colm, HAYCOCK-STUART Elaine, HUNTER Emma, INGRAM David, JEFFERY Laura, LAMONT-BLACK Simone, LORETTO Wendy, MACIOCIA Antony, MARTIN Catherine, MATTHEWS Keith, MCLACHLAN Gavin, MCQUEEN Heather, MOLE Damian, MORRIS Andrew, POWELL Wayne, REYNOLDS Rebecca, RYDZEWSKA Ewelina, SCHWARZ Tobias, SHIPSTON Mike, SILMEE Nowar, TAYLOR Paul, TERRAS Melissa, TUDHOPE Alexander, WEIR Christopher, WILLIAMS Mark.

The Convener, Principal Professor Peter Mathieson opened the meeting and confirmed that Senate had reached quorum. Members were reminded of the etiquette for Senate meetings conducted online.

1.	**Convener's Communications**
	The Convener noted the following points
	• The Principal extended his thanks to Senate for the well wishes conveyed by Senate when he was unwell in August.
	• People and Money has generated a high level of concern among colleagues, which was acknowledged by the University Senior Leadership. Additional resource has been focussed to help clear a backlog of invoices and there is evidence that this is starting to have an impact.
	• A student occupation of the Gordon Aikman Lecture Theatre is currently underway, resulting in disruption to teaching and preventing Senate meeting in person. There is open communication between the students, Security, and the University and the occupiers are taking account of Health and Safety concerns.
	• The Student Accommodation guarantee for first-year and overseas students has been met and exceeded by approximately 2000 students. The Convener understood that all students seeking emergency accommodation have received an offer..
	• The UK Research and Innovation (UKRI), who is a major funder of research, increased PGR stipends to take account of cost of living increases. The University has agreed to align with the UKRI by increasing levels of other PGR stipends
	• The University has elected to implement the increased Real Living Wage immediately to reflect the cost of living crisis.
	• Increased funds have been made available under the Student Hardship Fund to reflect the increase pressure resulting from the cost of living crisis.
	• The Taras Shevchenko National University of Kyiv, who the University has a twinning agreement with, was recently subject to deliberate attacks. The University wrote a message of support for the partner University in response to the attacks.
	In response to this update, the Students' Association President noted the Advice Place are still receiving enquiries from students awaiting emergency accommodation. The University Secretary agreed to look into this issue.
	1.1 Update from Timetabling Unit
	Deputy Secretary, Lucy Evans provided an update on behalf of the Timetabling Unit. She indicated that since the University has returned to full scale, in-person teaching, there have been challenges in scaling up operations, which the Unit is in the process of addressing. This has resulted in some key challenges, and there are plans in progress to address these, summarised as follows:
	• The planning exercise begun later than usual due to uncertainty regarding a return to in-person teaching. The Timetabling Unit are reviewing timelines for this process moving forward.
	• There were a significant number of late submissions from Schools, likely related to uncertainty around in-person teaching, making it difficult to achieve a clash-free timetable. The Unit is reviewing the process for submission of timetabling information.
	• A high volume of change requests (approximately 5000) were received at the start of the semester. Thought is being given to capturing change requests earlier in the process.
	• A corruption of the database occurred in the first week of teaching and resulted in a full shut down and rebuild of the system. A process is underway to procure a new system.
	• The forthcoming opening of the Nucleus at the Kings Building's campus will assistance with the capacity of the University Estate.
	She thanked colleagues for their patience and support during a challenging period, and for the comments received prior to the meeting, and invited Schools to contact her if they wish to discuss the issue further.
2.	**2.1 Senate Minutes** **S 22/23 2 A**
	• Minutes of Senate meeting held on 11 August 2022
	• Report of E-Senate held from 14 September – 28 September 2022
	Senate approved the minutes of the meeting held 11 August 2022, and the report of E-Senate held from 14 September - 28 September 2022.

2.2 Matters arising
- **Report of Curriculum Transformation Programme costs [Minutes of 9 February meeting of Senate, Item 4]**

Deputy Secretary, Lucy Evans provided an update on the Curriculum Transformation Programme costs. While it is too early in the project to provide a detailed assessment of costs, she reassured Senate that the project team are mindful of resourcing associated with Curriculum Transformation and taking this into account for planning purposes, and have been gathering information on what resource is needed and consulting with universities with similar programmes to gain an understanding of their resourcing experience. The team are conscious that staff with a key role in implementing Curriculum Transformation would also have a key role in other projects, such as the Student Support Model.

Senate members raised the following points:
- When initially raising this issue at the meeting held 9 February 2022, Senate asked for information on costs associated with the project, including consultancy costs. The Vice-Principal Students indicated at the time these would be provided.
- MVM is in the process of revising its Medicine curriculum, and it would be helpful to clarify the relationship between this review and Curriculum Transformation.
- Resourcing with regard to timetabling was raised, in relation to both sufficient staff capacity and sufficient teaching spaces.
- Academic staff require sufficient time to redesign teaching based on the spaces they are allocated.

Ms Evans thanked members for their comments and made the following points:
- Preliminary figures on Curriculum Transformation costs are not available at present. An update would be provided to Senate at a future meeting.

- **External examiner concessions associated with industrial action - to be covered under Item 17 – Report of Concessions from APRC [Minutes of 25 May meeting of Senate, Item 6]**

Convener of Academic Policy and Regulations Committee (APRC), Dr. Paul Norris confirmed that this would be covered under Item 17: *Report of Concessions Approved by Senate Academic Policy and Regulations Committee.*

2.3 Welcome to new student members

Welcome was extended to the following new student members.
- Aditi Jain, Undergraduate representative
- Amrit Gill, Undergraduate representative
- Annie Liu, Undergraduate representative
- Izabella Skowronska, Undergraduate representative
- Tobias Hansen, Undergraduate representative
- Yong Guo, Undergraduate representative

| 3. | **Further Information on the Powers of Senate** S 22/23 2 B |

Further Information on the Powers of Senate   **S 22/23 2 B**
To note

This item was introduced by Tom Ward, Director of Academic Services. The paper sets out Legal Services' legal advice on the Powers of Senate, and provides context for items later in the agenda. The Convener indicated that he accepts the advice.

Senate members raised the following points on the item:
- The legalistic phrasing in the paper was difficult for some members to understand.
- Whilst the paper is specific to the Sustainable Travel Policy paper, the paper makes statements about the limitations of Senate's powers, which may pertain to other issues. Some members felt these points required further discussion and did not agree with the advice as presented.
- The advice appeared based on a restrictive reading of the limits of Senate's powers.

		• One elected member stated they had engaged in lengthy dialogue with Academic Services to clarify the legal powers of Senate and a number of their queries remain unanswered. The University Secretary confirmed that questions could continue to be put to Academic Services. • The paper does not explain how the powers of Senate and Court intersect with the powers of University Executive. • A paper outlining the interaction between Senate and Court's powers would be useful to develop shared understanding across Senate and Court. • Senate is spending a lot of time discussing legal and procedural issues, which means that there is less time for substantive discussion and debate. In general, Senate members indicated that they would find it useful to have an opportunity to ask Legal Services questions about the paper. The University Secretary indicated that, if members submit questions or concerns on the paper to Senate Support, she will be able to arrange for Legal Services to provide a response for the next meeting of Senate.
4.		**Senate Standing Committees – upcoming business** S 22/23 2 C To note and comment This paper was introduced by Professor Tina Harrison, Convener of SQAC, on behalf of Senate Standing Committee Conveners. . She thanked Senate members for their useful engagement in the recent round of Committee business. Senate noted the paper. In response to queries, Tina Harrison and Lucy Evans (Deputy Secretary, Students) clarified that: • Senate Quality Assurance Committee (SQAC) will have a role in determining how to approach the evaluation of the roll out of the Student Support Model, in conjunction with the project's Board. • Student Experience Services is taking steps to address the backlog of cases for the Student Disability Service, and the Senate Education Committee is the appropriate Senate committee to oversee this.
5.		**Senate Standing Committees membership** S 22/23 2 D To approve This item was introduced by Tom Ward, Director of Academic Services. Senate approved the paper, subject to one amendment. In order to, where possible, achieve an even distribution of these additional members across the three Colleges, the three elected member positions are nominally assigned to each College. If vacancies remain following each College being assigned a position, any remaining positions will be allocated to interested nominees. If the number of nominees exceeds the number of places then the drawing of lots will determine who is assigned the position(s). Senate also approved one further amendment related to the member of the committees: *Each Committee Convener is expected to propose for approval by the Senate Exception Committee and/or next Senate Meeting reasonable additions to their committee to improve BAME, student, and trade union representation.* • Conveners to present an update on how they intend to account for the views of underrepresented groups on their Committee's to the February 2023 meeting of Senate. They made the following points • The composition of Standing Committees is reflective of the recruitment of post holders to College positions, which constrains the Conveners' ability to respond to the amendment. • The composition of Standing Committees is to be considered by the externally facilitated review, and that full consideration of the composition of Standing Committees should be held over until the outcome of the review is available. There may be unintended consequences of a further expansion of membership without due consideration.

	• Committees can seek input from underrepresented groups without requiring an expansion of the membership, for example, via consultation. Senate also approved the Terms of Reference for the Standing Committees. The Terms of Reference would be revisited once the outcome of the externally facilitated review was available, and once the newly-introduced arrangements for strengthening Senate's oversight of and engagement with the Standing Committees could be evaluated.
6.	**Curriculum Transformation Update** **S 22/23 2 E** To note and comment This item was introduced by Dr Jon Turner, Director of the Institute for Academic Development. The paper provided Senate with an update on the Curriculum Transformation Programme, including the development of a proposed curriculum framework which will be presented to Senate and relevant Standing Committees in early 2023. Members were invited to submit comments by email to Dr Jon Turner.
7.	**Draft Resolution – Code of Student Conduct** **S 22/23 2 F** To comment This item was introduced by Dr Kathryn Nicol, Head of Policy and Regulations, Academic Services. Senate were invited to comment on the paper, which will be submitted to the University Court for final approval in December. Comments received from members prior to the meeting would be taken into account prior to the final version being presented to Court. Senate members raised the following points on the item: • One of the offences under the Code is 'offensive' behaviour or language. Since there is variation in what individuals deem offensive, it would be helpful for the University to define what it means, to avoid impinging on freedom of speech. • The EUSA VP Welfare read out a statement prepared in consultation with students who had experience of the Code process. The statement was critical of the current process and called for further work to be undertaken to revise the Code of Student Conduct, particularly with a view to strengthening the University's action in relation to gender-based violence, and included practical suggestions for taking this work forward. • The Students' Association asked whether further changes could be made to the Code in advance of presenting the revised Code to Court for approval. Dr Nicol made the following points in response: • The Code of Conduct is one strand of support available to students who wish to disclose information about gender-based violence to the University. • Academic Services receives specialist advice including legal advice when considering cases relating to allegations of 'offensive' behaviour or language, and use the University's Academic Freedom and Freedom of Expression Statement as a reference point. • If the Code is approved by Court in December 2022, it will be implemented from January 2023 and accompanied by student-facing guidance to support the revisions. This will also be an opportunity to refresh awareness of the Code process among key stakeholders. • There is insufficient time to make further significant changes to the Code in time for December 2022 in a considered and responsible manner. However, further work on the Code is planned, which will include consultation with the Students' Association, and Senate members' comments will feed into this longer term piece of work to improve the process. Members were invited to submit further comments on the current or future revisions to the Code to Dr Kathryn Nicol.
8.	**Revision to the Sustainable Travel Policy (2021)[1]** **S 22/23 2 G** To comment and endorse

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[1] Legal advice indicates that Senate does not have the power to make binding decisions on this item.

This item was introduced by Professor Diana Paton. The paper was a continuation of the discussion on the topic held at Senate in May 2022.

The Principal confirmed that, while Senate does not have the power to make decisions on this item, he was content for Senate to express its views on the matters. He had asked the University Executive to delay consideration of a sustainable travel item until its meeting in November 2022 to allow the views of Senate to be fed into this discussion. He indicated that, in addition to these discussions at Senate, the University has taken other steps to gather feedback on how well the Policy is working in practice.

Senate were invited to comment on the paper. The following points were made:
- Senate members continue to have concerns that the travel policy is negatively affecting academic work at the University, including work associated with academic research time. The impact on Postgraduate Research students' ability to undertake their research within available budgets was highlighted as being of particular concern.
- In particular, colleagues raised concern regarding the impact of the single supplier booking requirement on staff and students conducting research.
- Senate members asked for more information on the terms of the contract with the supplier, including whether the contract stipulates a requirement for a single-supplier to be used for travel bookings.
- Concern was raised that the core ethos of the policy may be overshadowed by the practical difficulties experienced with the arrangements for travel bookings. It was noted that the primary issue should be to use the policy to positively change practices and attitudes to support more sustainable travel.

Senate endorsed the paper's analysis of the negative impact of aspects of the policy, and endorsed the proposals that those with primary executive oversight should seek to address these issues, including removing the single supplier rule for academic travel.

The Principal indicated that he and the senior leadership team recognise colleagues' concerns, and he confirmed that the views of Senate would be shared with the University Executive at their next meeting. Senate members were encouraged to continue sharing concerns and comments to their Head of School or Head of College. The University Secretary agreed to confirm the position on some specific elements of the contract with the supplier, including the date of expiry of the contract, whether the contract includes any formal review points, and whether the contract stipulates a requirement for a single-supplier to be used for travel bookings.

9.	**Senate and its Standing Committees Internal Effectiveness Review 2021/22** **S 22/23 2 H** To note and comment This item was introduced by Tom Ward, Director of Academic Services. Senate noted its thanks to Academic Services for undertaking the Internal Effectiveness Review. Members were invited to submit comments on the feedback from the review and proposed actions in response to Tom Ward.
10.	**Solidarity with Students in Iran** **S 22/23 2 I** To discuss and comment **CLOSED** This item is closed business.

ITEMS FOR FORMAL APPROVAL OR NOTING

11.	**Senate Exception Committee Terms of Reference and Membership 2022-23** **S 22/23 2 J** To approve This item was presented to Senate for approval. A Senate member (with appropriate seconders) introduced four amendments in relation to this item. Prior to making a decision on the amendments, Senate noted the following points: - The meeting was close to its scheduled end and there was insufficient time to fully consider the amendments put forward.

- The proposer noted that he had made the proposed amendments available to Academic Services in May 2022.
- There may be unintended consequences and practical implications to adopting some of the amendments, and it would be appropriate for Senate to consider an analysis of the implications before making a decision.

Notwithstanding these points, Senate decided to consider the amendments.

An amendment (Amendment 1) was moved and adopted without vote by Senate. It modified sections 2.3 and 3.4 as follows:

2.3 Unless otherwise represented, the membership of the Committee must also include two **elected academic staff** *Senate members and a representative of the Edinburgh University Students' Association (normally the President).*
*3.4 Four members of the Committee shall be a quorum. This number must include the Principal or Vice-Principal Students and a***n elected academic staff** *Senate member*.

An amendment (Amendment 2) was moved, seconded and passed by majority vote. inserted the following in section 3.2:

3.2 The aim will be to circulate minutes, agendas and papers to members of the Committee at least five working days in advance of the meeting or prior to the conclusion of the consultation period. ***Notice of business shall be given to the Senatus to the extent possible, and papers made available upon request so that comments can be given to a member of the Committee.*** *In cases of extreme urgency, which is likely to be the case given the nature of this Committee, and with the agreement of the Convener, papers may be tabled at meetings of the Committee. If being conducted by correspondence the consultation period may be no shorter than a 24 hour period*.

An amendment (Amendment 3) was moved and adopted without vote by Senate. It inserted the following in section 4.1:

4.1 To consider any matter between meetings of the Senatus ***that cannot await the next such meeting*** *and with the* ~~full~~ *delegated authority of Senatus to make a decision on the matter on behalf of the Senatus* ***insofar as a decision cannot be deferred to a meeting of the Senatus***.

An amendment (Amendment 4) was moved and adopted without vote by Senate. It modified section 2.3 as follows (with text from amendment 1 in italics):

2.3 Unless otherwise represented, the membership of the Committee must also include ~~two~~ **six** *elected academic staff Senate members*, ***including at least one such member from each College,*** *and a representative of the Edinburgh University Students' Association (normally the President).*

In addition to approving the four amendments, Senate approved the minor amendment to the Committee membership, as set out in the paper.

12.	**Report from the Honorary Degrees Committee**	**S 22/23 2 K**
	Additional Report from the Honorary Degrees Committee	**S 22/23 2 KK**
	To approve	**CLOSED**
	This item is closed business.	

13.	**Senate Elections 2022/23 – key dates**	**S 22/23 2 L**
	To note and comment	
	Senate noted the paper.	

14.	**Edinburgh University Students' Association VP Education Priorities 2022-23**	**S 22/23 2 M**
	To note and comment	
	Students' Association VP Education Sam Maccallum introduced this item. They emphasised that some students are very concerned regarding the return to in-person examinations, particularly since students in Years 3 and 4 in have never taken in-person examinations during their degree programme.	

	They also raised concerns regarding the timing of the Student Disability Service communicating Learning Adjustments through to teaching staff and other staff responsible for examinations.	
	• Prof Tina Harrison indicated that the Senate Education Committee had recently approved new Assessment and Feedback Principles and Priorities, which encouraged staff to consider inclusivity through assessment design. She also reported that appropriate senior University staff are actively engaged in discussions with Schools regarding in-person exams.	
15.	**Student Partnership Agreement** To note Senate noted the paper. Professor Tina Harrison invited members to contact her with any queries or comments on the paper.	**S 22/23 2 N**
16.	**Research Strategy Group update** To note Senate noted the paper. It was noted that a paper is being prepared by the Provost for the University Executive, highlighting the University's excellent performance on REF and explaining how the University will utilise the additional Research Excellence Grant funding that the Scottish Funding Council allocated to the University. This paper would be made available to Senate in due course.	**S 22/23 2 O**
17.	**Report of Concessions Approved by Senate Academic Policy and Regulations Committee** To note and comment This item was introduced by Convener of APRC, Dr Paul Norris. The paper was provided to address the matter arising of the 25 May 2022 meeting of Senate. Senate noted the paper. Members were invited to raise comments with Dr Norris via email.	**S 22/23 2 P**

Electronic Senate

Report of Electronic Business of Senate conducted between
Wednesday 11 January and Wednesday 25 January 2023

1. **Draft Resolutions: Chairs (e-S 22/23 2A)**
    An error was identified in Resolution 5/2023. Court confirmed the correction and the Resolution was updated.

    Senate was invited to make observations on the draft Resolutions. Congratulations were extended to the new chairs.

2. **An update to the Senate membership – New Student Members**
    An error was identified and the membership was updated. Patrick Lennard is the Postgraduate Research Student Representative.

    The updated membership was noted.

3. **Conferment of the title of Professor Emeritus / Emerita (e-S 22/23 2 B)**
    Senate agreed to confer the title of Professor Emeritus / Emerita on those professors listed in the paper.

4. **Communications from the University Court (e-S 22/23 2 C)**
    Senate formally noted the communications. Comments were received from two members and were passed to the author of the report.

5. **Report from Knowledge Strategy Committee (e-S 22/23 2 D)**
    The report was noted. A comment was received from one member and passed to the author of the report.

Senate

8 February 2023

Senate Standing Committees – upcoming business

Description of paper

1. This paper informs Senate of the main points of activity and business that we anticipate that the Senate Standing Committees will consider between February 2023 and April 2023.

Action requested / recommendation

2. Senate is invited to note the paper, and to make comments.

Background and context

3. As has been established as practice, a note of upcoming key items of business from the Senate Standing Committees is a standing item on the agenda for Ordinary meetings of Senate. This is intended to facilitate Senate awareness and oversight of Standing Committee activity. This note does not a comprehensive overview of all business that the Standing Committees may consider during this period.

Discussion

4. See Appendix 1 for the information from each Committee.

Resource implications

5. None - any resource implications related to Standing Committee business will be raised at the relevant Committee.

Risk management

6. This activity supports the university's obligations under the 2017 Scottish Code of Good Higher Education Governance.

Equality & diversity

7. None - any Equality and Diversity issues related to Standing Committee business will be raised at the relevant Committee.

Communication, implementation and evaluation of the impact of any action agreed

8. Any comments from Senate will be fed back to the Conveners of the Senate Standing Committees by Senate Support.

Author
Brian Connolly, Academic Policy Officer
Olivia Hayes, Academic Policy Officer
Tom Ward, Director of Academic Services

Presenters
Professor Colm Harmon, Convener of SEC
Professor Tina Harrison, Convener of SQAC
Dr. Paul Norris, Convener of APRC

Freedom of Information
Open

27 January 2023

Appendix 1

Senate Standing Committees: upcoming business February 2023 – April 2023

Senate Education Committee (SEC)	
Upcoming business:	**Brief description and context:**
1. Replacement to Academic and Pastoral Support Policy	The Committee will consider, for approval, a new policy framework to replace the existing Academic and Pastoral Support Policy, in order to take account of the full roll-out of the new Student Support Model, with a view to implementing the new policy from the start of academic year 2023/24.
2. Review of Lecture Recording Policy	Information Services Group is leading a review of the University's Lecture Recording Policy, with a view to presenting proposals for amendments to the Policy to the March meeting of SEC for approval, with a view to the revised Policy coming into effect in academic year 2023/24.
3. Assessment and Feedback	The Committee will firm up plans for the membership of two new task groups to coordinate institutional activities around assessment and feedback (one focussing on strategy and policy, the other on guidance, procedures, data, systems and evaluation). These groups will report to SEC, APRC and QAC as appropriate depending on the nature of the business, and APRC and QAC will also need to agree the constitution of the groups. In parallel with firming up the membership, the groups will begin to take forward urgent issues and may present proposals to the relevant Committee during this period.
4. Curriculum Transformation	This a standing item on SEC agendas in 2022/23. The exact nature of the business that SEC will consider during this period will depend on the decisions and advice that the project requires.
5. Student Experience	This is a standing item on SEC agendas in 2022/23.
6. Doctoral College	This is a standing item on SEC agendas in 2022/23. Potential issues for discussion during this period include the idea of introducing a Higher Education Achievement Record for PGT students.

Senate Quality Assurance Committee (QAC)

Upcoming business:	Brief description and context:
1. Thematic Review	The Co-Convenor of the Race Equality and Anti-Racist Sub-Committee (REAR) will attend the February meeting to discuss the implementation of the recommendations of the Thematic Review 2018-19 black and minority ethnic students' experience of support. Thematic Review is the process by which the Committee reviews the quality of the student in relation to a particular theme or aspect of student support, rather than an individual service or academic area.
2. Annual Reports	The Committee will consider the following annual reports covering 2021-22 (and identify actions in response): • **Academic Appeals** (an analysis of the appeals submitted, identifying areas for action and further consideration). • **Student Discipline** (an analysis of breaches of the Code of Student Conduct). • **Complaint Handling** (an analysis of the handling of complaints to the University, line with the requirements of the Scottish Public Services Ombudsman and the University's Complaint Handling Procedure). • **Annual Review of Student Support Services** (an analysis of the annual reports from each of the Student Support Services, highlighting good practice and areas for further development).
3. Annual Monitoring, Review and Reporting	The Committee will consider changes to the School and Programme-level annual reporting templates for 2022-23 to ensure that key institutional issues are reported on where required.
4. Undergraduate Degree Outcomes	The Committee (at the April meeting) will consider the annual report on degree classification data broken down by School and benchmarked against the Russell Group at subject group level.

5. Scotland's Rural College	The Committee will consider the annual report for 2022-23 of the Accreditation Committee of Scotland's Rural College (SRUC). It may also consider a proposal from SRUC for extending the accreditation arrangements to incorporate PGR awards.

Senate Academic Policy and Regulations Committee (APRC)

Upcoming business:	Brief description and context:
1. Industrial Action	So far, the Committee has decided that it is not yet necessary to consider any general variations to academic regulations and policies in order to mitigate against the impact of industrial action on students while maintaining academic standards. It will however continue to monitor the impact of industrial action on teaching and research student activities and, if required, consider the case for potential general variations to normal regulations and policies. It will also consider on a case- by case- basis how to mitigate substantive disruption for individual courses / programmes / Boards of Examiners.
2. Coursework Extension (CE) and Special Circumstances (SC) task group	The CE & SC task group was set up by APRC to review policies relating to Coursework Extensions and Special Circumstances. The task group may propose some regulatory changes to the Committee's next meeting.
3. Individual student concessions	Some actions to address student circumstances require APRC approval. These requests are dealt with as they arise, usually by Convener's action, and the decision is reported back to the relevant College by the Committee Secretary.
4. Regulations review	The Committee will consider proposals for essential changes to regulations in advance of the annual review of the degree and assessment regulations in March/May 2023. Senate will then have an opportunity to comment on proposals for changes to the degree regulations, before Court approves them.
5. Curriculum Transformation	Depending on the project's programmes, the Committee may consider the regulatory and policy implications of the proposed Curriculum Transformation framework

SENATE

8 February 2023

Senate Elections 2023/24 & Senate Standing Committee Elections 2023/24: Arrangements for Academic Staff seeking election to Senate in 2023 & Election of Senate elected members to Standing Committees for 2023/24

Description of paper

1. This paper requests Senate approve specific arrangements for the operation of the 2023 elections for academic staff to Senate, and informs Senate of a consequential technical amendment to the Senatus Academicus (Senate) Election Regulations. It requests Senate approve arrangements for the election of elected Senate staff members to Senate Standing Committees for 2023/24.

2. The paper also invite Senate to consider a change to the Senate Election Regulations in relation to the status of Senate Assessors on Court.

Action requested / Recommendation

3. Senate is asked to **approve:**
    3.1. The appointment of a Returning Officer and Deputy Returning Officer for the Senate election;
    3.2. The opening of the call for nominations for members of academic staff to stand for election to Senate;
    3.3. The deadline for the submission of nominations and the date of the election.
    3.4. Senate is invited to consider two alternate timelines for receiving nominations and conducting voting for elections.
        3.4.1. The dates proposed by Senate Support are provided in paragraph 14.
        3.4.2. The alternative dates proposed by an elected academic staff member of Senate, Dr Michael Barany, are provided in Appendix 1.

4. Senate is asked to **approve** a new process for allocating terms of office to defined groups of elected academic staff candidates in order to achieve an equal balance of positions becoming available for election in each category, each year. Senate is invited to consider two options for this process, outlined in paragraph 25 and 26. These are expanded on in Appendix 2.

5. Senate is asked to **note** the technical amendment to Appendix 4 of the Senate Election Regulations, appended below, adding the Provost to the list of *Ex Officio* members (in place of the former Senior Vice-Principal role). The correction is marked in track changes.

6. Senate is asked to **approve:**
    6.1. The appointment of a Returning Officer and Deputy Returning Officer for the Senate Standing Committee election;
    6.2. The opening of the call for nominations for Senate elected academic staff to stand for election to Senate Standing Committees;
    6.3. The deadline for the submission of nominations and the date of the election.

7. Senate is asked to **consider** a change to the Senate Election Regulations to exclude Senate Assessors from the overall count of elected Senate members. The proposal, put forward by Dr Michael Barany, is provided in Appendix 3. An analysis of the

proposal from Academic Services, which highlights a potential issue regarding alignment with Ordinance 212, is set out in paragraph 37. Should Senate support the proposed change, Academic Services would seek Court approval for it.

Background and context

8. Under University Ordinance 212 (Composition of the Senatus Academicus) academic staff elect from their own number 200 members of the Senatus Academicus.

9. Under the Senatus Academicus (Senate) Election Regulations, the call for nominations will normally be made after 31 January each year, normally at the next Senate meeting. At this meeting, Senate will agree a deadline for the submission of nomination forms and the date on which the election will be conducted, and will appoint a Returning Officer and Deputy Returning Officer.

10. The provisional Senate election dates for 2023 elections were provided to Senate for comment on 12 October 2022. The proposed dates below are the same as the provisional dates previously advised.

11. For information, a table of the positions open for election in 2023 is provided below.

Position	Total open for election 2023	Total positions
CAHSS Academic Staff (non-professorial)	10	34
CAHSS Academic Staff (professorial)	28	34
CMVM Academic Staff (non-professorial)	19	33
CMVM Academic Staff (professorial)	25	33
CSE Academic Staff (non-professorial)	22	33
CSE Academic Staff (professorial)	26	33
Total	130	200

12. Senate members are encouraged to make themselves available if colleagues contact them wishing to discuss potentially standing for Senate.

Discussion

Election to Senate – Returning Officer, and timelines

13. Lisa Dawson, Academic Registrar is nominated as the Returning Officer of the Senate Elections. Olivia Hayes, Academic Policy Officer, is nominated as the Deputy Returning Officer. Senate is invited to approve these nominations and appoint these candidates under paragraph 25 of the Senatus Academicus (Senate) Election Regulations.

14. Senate is invited to approve the dates of the nomination and election process. This paper offers two alternative timelines. The following table sets out the timelines that Academic Services had presented to Senate on a provisional basis in October 2022:

Wednesday 8 February 2023	Nominations open
Wednesday 8 March 2023 (12 noon)	Nominations close
Wednesday 22 March 2023 (9am) to Wednesday 29 March 2023 (12 noon)	Voting open online

15. An elected member of Senate, Dr Michael Barany has proposed an alternate timeline for the nomination and election process. These are provided in Appendix 1 for Senate's consideration. Dr Barany proposes that the nominations open at a later point than the dates provided in paragraph 12. The proposed alternate dates would see voting taking place during the Revision and Examination period.

16. Senate is invited to decide which of these options to approve.

17. One consequential technical amendment has been made to the Senate Election Regulations, identified in Appendix 4. This corrections is to include the Provost in the breakdown of ex officio members, replacing the Senior Vice-Principal. Senate was informed of this update at the 11 August 2022 meeting. Under paragraph 4 of the Senate Election Regulations, Senate is not required to approve these changes.

Proposal to allocate one, two and three year terms

18. The 2019 Senate election procedures, which supported the implementation of the revised composition of Senate in 2020, included special provision for members to be randomly allocated to one, two or three year terms. Senate took this approach to manage a transitional period from the previous to the current model of Senate. The intent of this approach was to enable the election of one third of the elected membership per year going forward, as in figure 1.
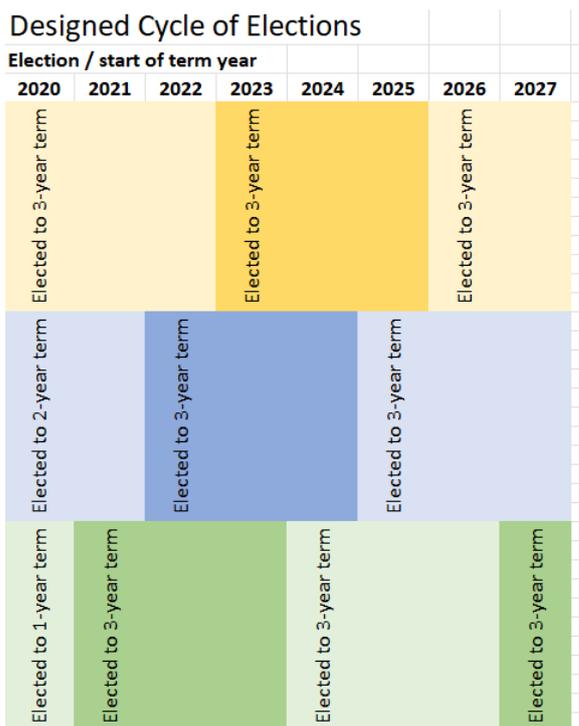

figure 1. *Designed cycle of elections to replenish 1/3 of elected positions annually in each cohort.*

19. In practice, the majority of seats have been filled unopposed and vacancies remain following the conclusion of elections, which are held on an annual basis in line with paragraph 21 of the Senate Election Regulations. Further vacancies arise when members leave the university or otherwise resign their Senate roles before the end of their standard 3-year term.

20. In 2023/24, there are a large proportion of positions available for election across the CMVM and CSE non-professorial categories, and across the CAHSS, CMVM and CSE professorial categories. See figure 2 for two examples.

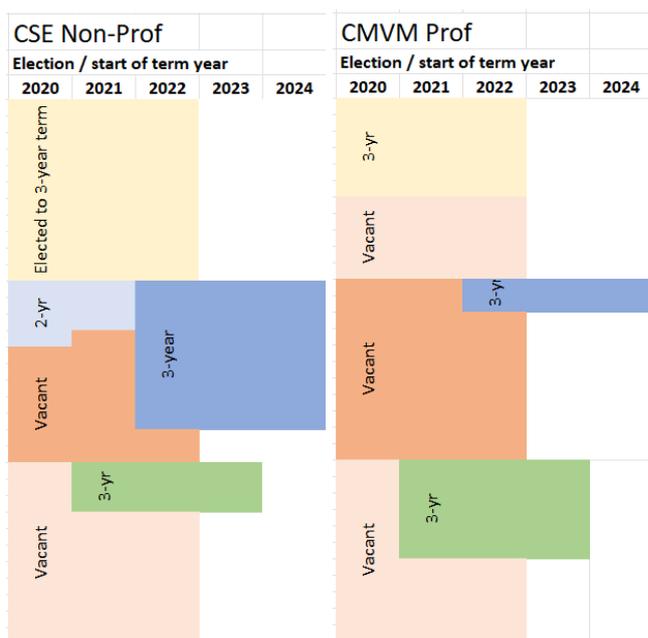| CSE Non-Prof						CMVM Prof				
Election / start of term year						Election / start of term year				
2020	2021	2022	2023	2024		2020	2021	2022	2023	2024

figure 2. Pattern of vacancies in two current constituencies.

21. In the event that there are significantly more than 11 nominations in constituencies with a large number of vacancies in the 2023 election, if every vacancy were filled with a three-year term this would take away from the number of positions becoming available for election in 2024 and 2025, with a large number of vacancies arising for election again in 2026. There is an argument that under this scenario there would be limited opportunity for academic staff to stand for election to Senate in two consecutive years, and that large changes in membership in subsequent years could lead to a deficit in continuing knowledge and experience on Senate. This would go against the design for regularly refreshing cohorts of members.

22. In order to address this potential issue, should the CMVM and CSE non-professorial categories, and/or the CAHSS, CMVM and CSE professorial categories receive a high level of interest and an election of these positions be necessary, an elected member of Senate, Dr Michael Barany has proposed that Senate assign one, two and three year terms to successful candidates, so that no more than 11 members from any cohort have terms ending in 2024, 2025, and 2026. This would allow a rebalancing of positions and mitigate against the potential implications outlined in paragraph 21.

23. Under paragraph 4 of Ordinance 212, Senate has the power to determine the terms of office for elected academic members, as long as they do not exceed three years. Under Election Regulations paragraph 22, Senate Support is to identify the number of vacancies in each category, but is not required to have all vacancies in each category be the same length.

24. If Senate is supportive of this broad approach, it is invited to consider two alternate methods for allocating term lengths.
Each option is presented below:

25. Option A
    25.1.   In the event that there are more candidates than available positions, a method of Single Transferrable Vote, Weighted Inclusive Gregory Method (STV WIGM) is utilised to conduct the election for the total number of positions as specified in paragraph 35 of the Senate Election Regulations.
    25.2.   Successful candidates are randomly allocated a one, two or three year term of office, as was done in 2020. Terms will be allocated to successful candidates in order to achieve an equal balance of positions becoming available for election in each category, each year.

25.3.   This proposal is described as WIGM-then-Random in Appendix 1.

26. Option B:
    26.1.   In the event there are more than 11 nominees in a cohort with more than 11 vacancies, a method of Staged-WIGM is utilised to conduct the election.
    26.2.   An election would take place even if there are enough vacancies for everyone, to allow the terms of office to be determined.
    26.3.   Voter preferences determine the terms of office each candidate receives, filling all available positions as in Option A and then continuing to use voter preferences to allocate longer terms among these candidates.
    26.4.   This option is proposed by elected Senate member, Dr Michael Barany
    26.5.   This proposal is described as Staged-WIGM in Appendix 1.

27. Senate Support is seeking advice from Court on the compatibility of both options with paragraph 30 of the Election Regulations, which describes how to proceed in the event of uncontested elections. If there is a conflict with that paragraph, it would be necessary to ask Court to approve a change to the Election Regulations and to delay the call for nominations until after Court has made its decision. Court's next scheduled meeting is on 27 February 2023.
28. Nominees to the CAHSS non-professorial category would receive a three year term, as is standard, as this category is on track for one-third of the positions to be available for election each year. The implications for the other constituencies are described in Appendix 1.
29. Senate Support recommend Option A on the grounds that it is simpler to operate and communicate, and consistent with arrangements in 2020, and would avoid the need to run elections solely in order to determine the length of terms of office.

Election to a Senate Standing Committee

30. At its 12 October 2022 meeting, Senate agreed to add three elected academic staff members of Senate to each of the Senate Standing Committees. For 2022/23, Senate agreed that the drawing of lots would determine which nominees were assigned to the membership of the Committee. This process was concluded in November and three elected academic staff members are currently serving on each of the Standing Committees. The terms of office for these members is to end on 31 July 2023.
31. At its 12 October 2022 meeting, Senate also approved the following election arrangements for 2023/24:
- Three places on each of the three Senate Standing Committees are allocated to elected members of Senate. The three elected member positions are nominally assigned to each College;
- Current elected academic staff members of Senate plus Senate Assessors and the Academic Staff Member of Court will have the opportunity to nominate themselves for membership of one of the three Senate Standing Committees. Nominees cannot seek membership of more than one Committee;
- Where the Senate term of a current member in one of these categories is due to end in July 2023, they can nominate themselves for membership of one of the Committees for 2023-24 as long as they plan to stand for re-election to Senate on the understanding that they would only be able to take up a place on the Committee if they secure another term on Senate commencing in August 2023;
- In the event that the number of eligible nominees for a Committee does not exceed the three available places each nominee will be assigned to the membership of the Committee;

- If vacancies remain following each College being assigned a position, any remaining positions will be allocated to interested nominees;
- In the event that the number of eligible nominations for a Committee exceeds the three available places, an election will determine which nominees are assigned to the membership of the Committee;
- Current elected academic staff members of Senate plus Senate Assessors and the Academic Staff Member of Court would be eligible to vote in this election (if an election is required);
- If required, the election would be conducted by means of the Single Transferrable Vote, Weighted Inclusive Gregory Method (STV WIGM). For each Committee, the three candidates with the greatest share of the vote would automatically be elected to the relevant Committee. In the event of a tie, the successful candidate or candidates would be determined by the drawing of lots;
- Voting would be conducted online, and the counting of votes would be conducted using an electronic counting system;
- For members assigned to a Committee, the term of office will run from 1 August 2023 until the end of 2023-24 (31 July 2024), with scope to subsequently seek election to the relevant Committee (in line with the arrangements agreed by Senate) for up to two further sessions;
- Should one or more of the three places on a Committee remain unfilled following the conclusion of these nomination and (if required) election processes, the vacant place(s) would be offered to member(s) who had unsuccessfully nominated themselves for a place on a different Committee for 2023-24. Were there more members than places, the place(s) would be distributed to the member(s) who had received the most votes for the Committee that they had stood for (if an election had been held) or by drawing lots (if an election had not been held);
- Should the members cease to be members of Senate prior to or during 2023-24, their membership of the relevant Committee will cease with immediate effect

32. Senate is asked to approve the appointment of a Returning Officer and Deputy Returning Officer for the Senate Standing Committee election. Lisa Dawson, Academic Registrar is nominated as the Returning Officer of the Senate Elections. Olivia Hayes, Academic Policy Officer, is nominated as the Deputy Returning Officer. Senate is invited to approve these nominations and appoint these candidates.

33. Senate is invited to approve the dates of the nomination and election process set out below, which align with those for election to Senate.

Wednesday 8 February 2023	Nominations open
Wednesday 8 March 2023 (12 noon)	Nominations close
Wednesday 22 March 2023 (9am) to Wednesday 29 March 2023 (12 noon)	Voting open online

34. To allow academic staff members seeking re-election to Senate to also stand for election to a Senate Standing Committee, the outcome of the Senate Standing Committee elections will be formally announced to Senate following the conclusion of the Senate elections.

35. For information, a table of the positions open for election in 2023 is provided below.

| **Position** | **Total positions** |
| Senate Academic Policy and Regulations Committee | 3: Each position is nominally assigned to a College. |

Senate Education Committee	3: Each position is nominally assigned to a College.
Senate Quality Assurance Committee	3: Each position is nominally assigned to a College.

Status of Senate Assessors on Court

35. Senate elects two Senate Assessors to Court. In 2022, Senate approved an amendment to the Senate Assessor Regulations to permit only those members of the electorate who are elected academic staff to stand for nomination and election as a Senate Assessor.

36. Senate Election Regulation 22 states that "Senate Assessors will be included in the count of College elected members throughout their term of office as a Senate Assessor".

37. In Appendix 3, Dr Michael Barany proposes a change to the Senate Election Regulations in relation to the status of Senate Assessors. Academic Services are not clear that this proposal is consistent with Ordinance 212, as the Ordinance states that the number of academic staff members elected from their own number to stand on Senate shall be 200, whereas the proposed change would increase the number to 202. While the current Regulations state that the Senate Assessors retain Senate membership as ex officio members for the duration of their term as Court members, it remains the case that they are academic staff members who are on Senate as a result of having been elected from their own number, and therefore should be included in the limit of 200 set by the Ordinance. See Appendix 3 for a response to this view.

38. Any change to the Senate Election Regulations requires approval by Court. Should Senate recommend the proposed change set out in Appendix 3, Academic Services will seek legal advice before passing this item to Court for its consideration. The University Court's next meeting is scheduled for 27 February. Should Senate wish to support a change to the Senate Election Regulations, the Elections could not take place before this date

Resource implications

36. Option B set out in paragraph 26 would be likely to have greater resourcing requirements associated with managing the election of academic staff to Senate relative to Option A, since it would be likely to require a greater number of elections. The cost of the Senate elections and the Senate Standing Committee elections will be met from within existing budgets.

Risk Management

37. The University's Risk Policy and Risk Appetite statement refers to the University holding 'no appetite for any breaches in statute, regulation.' Senate elections are mandated by University Ordinance 212.

Equality and Diversity

38. An Equality Impact Assessment (EIA) has been conducted and is available on the Equality and Diversity webpages. This assessment assumes a regular rotation/refreshment of members and the filling of most elected vacancies.

39. Senate Election advertising materials highlight the University's commitment to improving the diversity of key University committees, and encourage all academic staff to consider standing. The Senate elections will be advertised widely through multiple channels.

Communication, implementation and evaluation of the impact of any action agreed

40. Senate and Senate Standing Committee elections will be managed by staff within the Academic Services team.

41. Information is available on the [Senate webpages](#).

42. Following approval by Senate, the opening of nominations for candidates to stand for election to Senate will be announced through multiple channels including the Senate website, all-staff email, and social media.

43. Following approval by Senate the opening of nominations for candidates to stand for election to Senate Standing Committees will be announced via email to the elected staff members of Senate.

44. Depending on Senate's decisions, actions of Court may be required to confirm changes to Election Regulations. These will be managed by Court Services in communication with Senate Support.

Author

Olivia Hayes
Academic Policy Officer
January 2023

With proposals set out in Appendices 1 to 3
submitted by
Dr Michael Barany
Elected Senate member

Freedom of information

Open

Appendix 1: Voting timeline

The paper sets out the intended voting timeline as follows:

Wednesday 8 February 2023	Nominations open
Wednesday 8 March 2023 (12 noon)	Nominations close
Wednesday 22 March 2023 (9am) to Wednesday 29 March 2023 (12 noon)	Voting open online

The only regulatory constraint is that we have results available to report to our May meeting of Senate. A number of practical considerations, such as holding the election as much as possible during the teaching period of semester 2, are factored into the proposed timeline above.

We might, however, wish to consider alternative timelines. If we wish to change the Election Regulations in any way, that would require Court approval at their 27 February meeting, meaning nominations could not open until 28 February at the earliest. We may also wish to consider that the most intensive period of UCU strike action is scheduled for precisely the planned nomination period, so this may not be the best time to collect nominations if we want to be able to talk with colleagues on campus about running for Senate.

It is suggested that to compensate for less-optimal timing in terms of the teaching calendar we may consider later nomination and voting periods as follows:

Wednesday 1 March 2023	Nominations open
Wednesday 29 March 2023 (12 noon)	Nominations close
Wednesday 19 April 2023 (9am) to Wednesday 26 April 2023 (12 noon)	Voting open online

This would allow results to be tabulated and winners informed before the Billet is assembled for the 24 May meeting of Senate.

Appendix 2. Comparison of Term Assignment Options

Our Election Regulations specify that elections be conducted by the Single Transferrable Vote, Weighted Inclusive Gregory Method (STV WIGM). This method asks voters to rank candidates from most to least preferred, and then finds a group of multiple winners based on the top preferences of voters while trying to minimise 'wasted votes' (i.e. if your top candidate gets many more votes than necessary to be a winner, a surplus share of your vote gets redistributed to help your next favourite candidate, and so on).

It's the kind of voting system that would be a massive pain to run by hand but is sensible and easy with the help of computers, and has been used in Scotland, Australia, Minnesota, Iceland, and this very university! There is a mathematical proof that no voting system is perfect, and voting nerds passionately debate which is least bad for specific applications. But the point is at the end of the day you decide on a system to use that seems to make sense for what you want, and you try to abide by its principles.

Because we want to elect multiple cohorts of multiple winners for the reasons discussed in the paper, we need to choose a variation on STV WIGM to account for this. The two possibilities being proposed are:

- WIGM-then-Random: use WIGM to determine who is elected in the first place, then randomly assign winners to 3, 2, or 1-year terms (filling 3-year terms first, then 2-year, then 1-year).
- Staged-WIGM: use WIGM to determine who is elected in the first place, then retain voters' preferences and use WIGM again to determine who gets a 2nd year of their term, then retain voters' preferences and use WIGM once again to determine who among the 2nd-year remainers stays on for a third year.

In both cases, nominees still nominate themselves for up to a 3-year term, and voters still submit a single ranked list of preferences. Everything else is done by computer behind the scenes, so voters only have to vote once.

The main differences are:

- In some cases, WIGM-then-Random lets us get away with not holding a vote at all, where Staged-WIGM would require a vote. It may be convenient not to hold votes in cases where they could be avoided. Conversely, holding a vote may be considered good civic hygiene, allowing members of the community to read candidate statements and participate in the process (and think about nominating themselves or peers in the future), so we might not want to avoid votes in situations that could go either way.
- In WIGM-then-Random, voter preferences are used only to determine who is elected at all, not who has a longer term. Voter preferences are discarded when allocating term lengths. In Staged-WIGM, voter preferences are used to determine who is elected *and* who stays on for longer, with the most preferred candidates elected to the longest terms. Depending on how you feel about the importance of WIGM's 'no wasted votes' philosophy, you might consider discarding vs retaining voter preferences to be less or more in the spirit of WIGM.

The two options involve slightly different interpretations of paragraph 30 of the Election Regulations, both arguably compatible with the regulation as written but neither really what the regulation seems to have assumed as the default situation. The regulation says the election is uncontested if there is "only one valid candidate for each vacancy." For WIGM-then-Random, all vacancies are considered equivalent from this perspective: the election is

considered uncontested if everyone can get a seat, even if not everyone gets a term of their preferred length. Staged-WIGM assumes that all nominees would prefer a 3-year term,[1] so the election is only uncontested if there are fewer candidates than the number of 3-year positions available. For example, if there are 15 nominees for 11 3-year terms plus 5 2-year terms, WIGM-then-Random considers it uncontested because there fewer nominees than the 16 total vacancies. Staged-WIGM considers this contested because there are more nominees than the 11 vacancies of the preferred 3-year length.

All the writing on election systems seems to agree that examples can really help to understand what is going on. Here is how the different processes look for the different constituencies:

CAHSS

Non-Professors: 10x 3-year vacancies only.

- 0-10 nominees: everyone wins! No election held.
- 11+ nominees: an 10-winner WIGM election determines who is elected to a 3-year term.

Professors: 12x 3-year vacancies + 11x 2-year vacancies + 5x 1-year vacancies.

- 0-12 nominees: everyone wins! No election held.
- 13-28 nominees:
  - o WIGM-then-Random: no election; randomly choose 12 for 3-year terms, 11 for 2-year terms, then 5 for 1-year terms as available.
  - o Staged-WIGM: if more than 23 nominees, a 23-winner WIGM election determines who has at least a 2-year term, followed by a 12-winner WIGM election among those winners to determine who gets a 3-year term; non-winners of the first election get 1-year terms.
- 29+ nominees:
  - o WIGM-then-Random: 28-winner WIGM election to choose who is elected, then discard voter preferences and allocate seats randomly as above.
  - o Staged-WIGM: 28-winner WIGM election, followed by 23- and 12-winner elections as above, retaining voter preferences.

CMVM

Non-Professors: 11x 3-year vacancies + 8x 1-year.

- 0-11 nominees: everyone wins! No election held.
- 12-19 nominees:
  - o WIGM-then-Random: no election; randomly choose 11 for 3-year terms then 8 for 1-year terms as available.
  - o Staged-WIGM: an 11-winner WIGM election determines who has a 3-year term; non-winners get 1-year terms.
- 20+ nominees:
  - o WIGM-then-Random: 19-winner WIGM election to choose who is elected, then discard voter preferences and allocate seats randomly as above.

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[1] Well, technically we could do Staged-WIGM where candidates can decide just to nominate themselves for a subset of the available term lengths. It all works out on the backend but adds some complexity to nomination and voting that we would rather not try to sort out for now.

- Staged-WIGM: 19-winner WIGM election, followed by 11-winner election as above, retaining voter preferences.

Professors: 11x 3-year vacancies + 9x 2-year vacancies + 5x 1-year vacancies.

- 0-11 nominees: everyone wins! No election held.
- 12-25 nominees:
  - WIGM-then-Random: no election; randomly choose 11 for 3-year terms, 9 for 2-year terms, then 5 for 1-year terms as available.
  - Staged-WIGM: if more than 20 nominees, a 20-winner WIGM election determines who has at least a 2-year term, followed by 11-winner WIGM election among those winners to determine who gets a 3-year term; non-winners of the first election get 1-year terms.
- 26+ nominees:
  - WIGM-then-Random: 25-winner WIGM election to choose who is elected, then discard voter preferences and allocate seats randomly as above.
  - Staged-WIGM: 25-winner WIGM election, followed by 20- and 11-winner elections as above, retaining voter preferences.

CSE

Non-Professors: 11x 3-year vacancies + 2x 2-year vacancies + 9x 1-year vacancies.

- 0-11 nominees: everyone wins! No election held.
- 12-22 nominees:
  - WIGM-then-Random: no election; randomly choose 11 for 3-year terms, 2 for 2-year terms, then 9 for 1-year terms as available.
  - Staged-WIGM: if more than 13 nominees, a 13-winner WIGM election determines who has at least a 2-year term, followed by 11-winner WIGM election among those winners to determine who gets a 3-year term; non-winners of the first election get 1-year terms.
- 23+ nominees:
  - WIGM-then-Random: 22-winner WIGM election to choose who is elected, then discard voter preferences and allocate seats randomly as above.
  - Staged-WIGM: 22-winner WIGM election, followed by 13- and 11-winner elections as above, retaining voter preferences.

Professors: 11x 3-year vacancies + 9x 2-year vacancies + 6x 1-year vacancies.

- 0-11 nominees: everyone wins! No election held.
- 12-26 nominees:
  - WIGM-then-Random: no election; randomly choose 11 for 3-year terms, 9 for 2-year terms, then 6 for 1-year terms as available.
  - Staged-WIGM: if more than 20 nominees, a 20-winner WIGM election determines who has at least a 2-year term, followed by 11-winner WIGM election among those winners to determine who gets a 3-year term; non-winners of the first election get 1-year terms.
- 27+ nominees:
  - WIGM-then-Random: 26-winner WIGM election to choose who is elected, then discard voter preferences and allocate seats randomly as above.
  - Staged-WIGM: 26-winner WIGM election, followed by 20- and 11-winner elections as above, retaining voter preferences.

One lesson that should jump out is that in practical terms the number of nominations makes a big difference:

- If nominations are similar to last year, the two options are the same because no category had more than 11 nominees.
- If nominations modestly increase, then the two options have the biggest practical difference because one involves taking a vote and the other does not. Because Senate Support considers this the most likely scenario, the recommendation of WIGM-then-Random is based on the goal of simplifying voting by not holding votes where it is not necessary to do so.
- If nominations increase significantly, then the two options are practically the same on the front-end, and the choice of options is about whether to retain or discard voter preferences in allocating term lengths. Though this scenario may be less likely based on recent experience, nominations can be quite unpredictable, and various policy conversations this year are likely to have increased university-wide interest in elected Senate roles. It might also be argued that voting systems should be designed around the 'ideal' scenario as well as expected scenarios, and ideally every constituency would have an abundance of enthusiastic nominees.

Appendix 3: Status of Assessors

There is a bit of a Catch-22 in the Ordinance and Regulations governing Senate elections as they currently stand. Ordinance 212 distinguishes two staff cohorts for Senate: *ex officio* (paragraph 2) and elected (paragraph 3). *Ex officio* members are specified by Court (see Appendix 1 of the Election Regulations) and are not eligible for election under paragraph 3.

Currently, Senate Assessors are representatives on Court of the elected staff members of Senate. They are made *ex officio* members because in order to serve their Court functions well they are considered to need 4-year terms in the role, and this *ex officio* status is probably unavoidable under our current regulations. However, as *ex officio* members, they are (as written) ineligible either for re-election as Senate Assessors (though this may be easily changed when we consider the Senate Assessor Election Regulations in 3 years' time) nor as at-large elected members in the event they are not re-elected as Assessors (a trickier situation that may involve a complicated process of amending Ordinance 212).

We are not in a position to resolve this issue here; this is mainly a problem for Court to resolve. But there is a secondary consequence of the current state of regulations that may need to be addressed by a small change in the Election Regulations.

The Ordinance 212 language that specifies the number of elected members specifically excludes *ex officio* members of Senate from that count. However, the Election Regulations re-insert them into the total in paragraph 22. It is possible to read Ordinance 212 as concerned only with whether the member was in an *ex officio* role at the time of their election (so the re-election issue remains unresolved but this secondary issue may be considered a moot point).

However, it seems more in the spirit of the Ordinance not to count the Assessors toward the total number of elected members, respecting the clear separation of *ex officio* and elected members in Senate and the different functions served by each in governance. When other elected members move to *ex officio* status, e.g. by appointment as Dean or Head of School, they are likewise removed from the elected member count.

When Senate Assessors are elected to their role, they are elected by all of Senate, which is not the same as the cohort of academic staff that elected them as paragraph 3 elected members. If the reasoning given above by Academic Services were to be taken, then it would also appear necessary to revise the Regulations to exclude other *ex officio* staff members of Senate who are elected by their peers, such as the Academic Assessor. Ultimately, there is probably some ambiguity in Ordinance 212 and Senate should adopt an interpretation that feels appropriate to the intent of the Ordinance.

In that case, paragraph 22 would need to be amended to delete the sentence that adds the Senate Assessors to the count of elected members. In practical terms, this would mean one more vacancy for Non-Professorial CAHSS members and one more for Professorial CSE members.

Appendix 4: Senate Election Regulations

THE UNIVERSITY *of* EDINBURGH

Senatus Academicus (Senate) Election Regulations

Composition of the Senate (Ordinance 212 Paragraphs 1-3 and 5)

1. The Principal of the University will preside at any meeting of the Senate.[2]

2. The Senate model will comprise the following categories with numbers apportioned as follows[3]:

Table 1

Position	Membership
Principal	1
Heads of Schools	21
Heads of Colleges	3
Other *ex officio* appointments	Approximately 50
Total *ex officio*	**Approximately 70 (maximum 80)**
Elected academic staff (Professorial)	100
Elected academic staff (Non-professorial)	100
Elected students	30
Total elected	**230**
Total Senate membership	**Approximately 300**

3. The elected membership of Senate will be broken down as follows:

Table 2

Position	Membership	Membership Breakdown
Elected academic staff (Professorial)	100[4]	34 Professors from the College of Arts, Humanities and Social Sciences
		33 Professors from the College of Science and Engineering
		33 Professors from the College of Medicine and Veterinary Medicine
Elected academic staff (Non-professorial)	100[5]	34 academic staff members from the College of Arts, Humanities and Social Sciences
		33 academic staff members from the College of Science and Engineering

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[2] Ordinance 212 Paragraph 1.
[3] Ordinance 212 Paragraphs 2, 3, and 5.
[4] Ordinance 212 Paragraph 3a.
[5] Ordinance 212 Paragraph 3a.

		33 academic staff members from the College of Medicine and Veterinary Medicine
Elected students	30[6]	See Appendix 2

4. Staff *ex officio* roles are detailed in Appendix 1. This list may be amended by the University Secretary from time to time, to reflect changes in organisational structures and job titles. Any changes will be notified to Senate at the next meeting of Senate.

5. The Students' Association will determine the office holders whose roles will entitle them to take up Senate membership and will be responsible for appointing these students to Senate.

6. The Students' Association must inform the Senate Support team if it is necessary to make any alteration to the list of office holders in Appendix 2 whose roles entitle them to Senate membership. Any changes will be notified to Senate at the next meeting of Senate.

7. Should a relevant Students' Association position become vacant for a period of time or a relevant student office holder be otherwise unavailable, the Students' Association will identify another appropriate elected student office holder to fill the vacant Senate position.

8. Election of Senate Assessors to the University Court operates under separate regulations relating to election to University Court. Senate Assessors on the University Court will comprise one Joint Academic and Senate Assessor and two Senate Assessors. Assessors are elected for a four-year term on Court; they retain Senate membership as *ex officio* members for the duration of their term as Court members.

Term of Office (Ordinance 212 Paragraphs 4 and 6)
Elected academic staff

9. Elected academic staff will stand for a term of office which will not exceed three years from the first day of August of the year of election.[7] Elected academic staff will demit office on 31 July of their final year in office.

10. There is no cap on the number of terms of office for which academic staff members may stand; academic staff members will be eligible for re-election for the same term of office provided that they demit office on ceasing to hold a contract of employment with the University.[8]

11. Elected academic staff members may resign membership at any time.[9] Their membership will remain vacant until the next scheduled Senate election.

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[6] Ordinance 212 Paragraph 5.
[7] Ordinance 212 Paragraph 4.
[8] Ordinance 212 Paragraph 4a.
[9] Ordinance 212 Paragraph 4b.

12. The term of office for undergraduate student members will be one year, starting on the first day of August in the year of election. The terms of office for postgraduate student members will be one year, starting on the first day of November in the year of election. Students will be eligible to stand for multiple terms of office consecutively. There is no cap on the number of terms of office for student members.

13. A student member will demit office on ceasing to be a student at the University. Student members may resign membership at any time.[10]

The Electoral Roll (Ordinance 212 Paragraphs 3 and 5)
Elected academic staff

14. Academic staff members who are eligible to stand for membership of Senate and elect members from their own number will hold appointments from the University Court, as attested by a contract of employment issued by the University.[11] In practice, 'Academic staff' will apply to all members of staff who are categorised as 'academic' in the University's Human Resources records.

15. All members of staff who are categorised as 'academic', and who also hold a personal or established chair, will be eligible to stand and vote in the 'elected academic staff (professorial)' category. All members of staff who are categorised as 'academic,' and who do not hold a personal or established chair, will be eligible to stand and vote in the 'elected academic staff (non-professorial)' category.

16. Members of the academic staff who hold a personal or established chair will not be eligible to stand and vote in the 'elected academic staff (non-professorial)' category. Members of the academic staff who do not hold a personal or established chair will not be eligible to stand and vote in the 'elected academic staff (professorial)' category.

17. Academic staff members who hold any of the posts or offices which qualify them for *ex officio* membership will not be eligible to stand for membership of Senate in either of the elected academic staff categories,[12] but are entitled to vote in the election for the academic staff category relevant to their role.

18. The electoral roll will be compiled from Human Resources' records on 31 January preceding the call for nominations meaning that nominees for the elected academic staff places will need to have been in their posts from this date in order to be eligible for nomination. Academic staff members who are allocated to the University Secretary's Group or Information Services Group will be included in the electoral roll for College of Arts, Humanities and Social Sciences.

19. Academic staff in both elected categories will be eligible to stand for the places which have been allocated to the College of which they are a member. If an academic staff member is a

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[10] Ordinance 212 Paragraph 6a, 6b.
[11] Ordinance 212 Paragraph 3
[12] Ordinance 212 Paragraph 3b

member of multiple Colleges, they will stand in the College where they work a greater proportion of their time (based on full-time equivalent). If an academic staff member works for equal amounts of time across multiple Colleges, they will be permitted to select the College in which they intend to stand, on condition that they only stand for election in one College, and that they declare in writing to the Senate Support Team in which College they intend to stand.

Elected students

20. The eligibility for students to stand for offices which can entitle them to Senate membership will be determined according to the eligibility criteria used by the Students' Association to appoint students to official roles. All students who are registered on credit-bearing courses, or who hold sabbatical offices, will be eligible for student membership.

Election of Academic Staff Members to Senate (Ordinance 212 Paragraph 7)

21. Elections for academic staff members will be held annually and will be run by the Senate Support team. There will be two elections for each College each year, one for eligible professorial staff vacancies and one for eligible non-professorial academic staff vacancies. Both elections will usually be held on the same day.

22. The Senate Support team will inform Colleges of the number of vacancies in each elected academic staff category and will report on an annual basis the members of each College in each category who will continue in office. Senate Assessors will be included in the count of College elected members throughout their term of office as a Senate Assessor.

Election Dates

23. The call for nominations for each election will be made after 31 January each year, normally at the next Senate meeting. No nominations will be accepted before this date. At this meeting, Senate will agree a deadline for the submission of nomination forms.

24. The elections will be conducted on a date which will be determined by the Senate in each year and all elections to Senate will usually take place on the same date in a given year. The elections must take place in time to communicate the results to Senate before its final meeting of the academic session, and the results must be communicated to Senate no later than 30 June each year.

Role of the Returning and Deputy Returning Officers

25. On an annual basis, Senate will appoint a Returning Officer and Deputy Returning Officer, who will be responsible for the management of the elections and the declaration of the results of the elections.

26. The Deputy Returning Officer will provide nomination forms calling for nominations and will draw attention to the correct procedure for making nominations. The call for nominations will be published by the Deputy Returning Officer and advertised via agreed channels.

Nomination and Validation of Candidates

27. Only members of the electorate in each category, as defined in paragraph 15, will be eligible to stand for election in that category. Eligible individuals will be entitled to nominate themselves as a candidate using the process specified in the call for nominations.

28. All nominations must be received by the deadline agreed by Senate. No nominations will be accepted after this date and time.

29. If the Deputy Returning Officer receives a nomination from an individual who is not eligible to stand for election under the terms defined in these regulations, the Deputy Returning Officer will contact the individual to inform them that their nomination will not be accepted. Where the individual whose nomination has not been accepted wishes to challenge the rejection of their nomination, they may do so by contacting the Returning Officer. The decision of the Returning Officer is final.

30. In the event of there being only one valid candidate for each vacancy and therefore an uncontested election, the Deputy Returning Officer will declare and publicise as soon as practicable the name of the valid candidate elected for each vacancy.

Conduct of election process

31. Each candidate will receive from the Deputy Returning Officer a copy of these Regulations.

32. If the Deputy Returning Officer has reason to believe that a candidate may have breached these Regulations, the Deputy Returning Officer will request a written explanation or clarification from the candidate. If the Deputy Returning Officer concludes that a material breach has occurred, the Deputy Returning Officer will inform the Returning Officer. The Returning Officer has the authority to disqualify a candidate, subject to the right of appeal by the candidate to the University Secretary (or specified delegated authority) within two working days of receiving written notification of the disqualification. The decision of the University Secretary (or delegated authority) will be final.

33. The validity of the elections will not be affected in the event that a candidate is unavailable to continue for any reason prior to the results of the election being announced and, where there is a greater number of candidates remaining than vacancies in any category, the election will proceed as planned. In the event of there being only one remaining candidate for each vacancy in any category and therefore an uncontested election in that category, the Deputy Returning Officer will declare and publicise as soon as practicable, and no later than two working days after confirmation of the uncontested election status, the names of the valid candidates elected.

34. The Deputy Returning Officer will distribute to each member of the electorate via email a link to the voting system along with a link to the relevant web page to view information about the candidates.

Voting arrangements

35. The elections will be conducted by means of the Single Transferrable Vote, Weighted Inclusive Gregory Method (STV WIGM). The candidates with the greatest share of the vote will automatically be elected.

36. Voting will be conducted by staff online. All those on the electoral roll will be permitted access and will be able to vote on the online voting system on the election date(s).

37. Members of staff who are formally employed in more than one College will be entitled to vote in all Colleges in which they are employed.

Counting

38. All votes cast online will be counted together using an electronic counting system.

39. In the event of a tie, the successful candidate or candidates will be determined by the drawing of lots. The Returning Officer will draw lots from the pool of candidates whose votes are tied until the available vacancies are filled.

Declaration

40. The Deputy Returning Officer will ensure that a notice of the result of the election is posted on the Old College Notice Board and posted to the Senate webpages as soon as is practicable after the result or results have been declared and communicated to Senate at the first meeting following the elections.

Election of Student Members to Senate (Ordinance 212 Paragraph 8)

41. Elections for student members will be held annually on dates to be determined by the Students' Association. Elections for student members will be conducted by the Students' Association in accordance with election regulations determined by the Students' Association, and with section 16 of the Higher Education Governance (Scotland) Act 2016.

2 December 2019

Document control

Date of approval / amendment	Details
2/10/19	Approved by Senate
2/12/19	Approved by University Court
5/2/20	Amended under section 4 by the University Secretary, Senate informed 5/2/20
27/1/21	Amended under section 6 by the Edinburgh University Students' Association, Senate informed 27/1/21
9/2/22	Amended under sections 4 and 6, Senate informed 9/2/22
8/2/23	Amended Appendix 1, Senate informed 8/2/23

Appendix 1

Senate *Ex Officio* membership
(See regulations 2 and 4)

Position	Membership	Membership Breakdown
Principal	1	**(Required under Ordinance 212)**
Ex officio appointments	Approximately 70, with a maximum 80 *ex officio* members in total.	Heads of Schools **(Required under Ordinance 212)** and Heads (Deans) of the Deaneries of the Edinburgh Medical School.
		Heads of College **(Required under Ordinance 212)**
		Provost
		Vice-Principals
		Assistant Principals
		Director of Library and University Collections
		Director of the Institute for Academic Development
		University Leads on Climate Responsibility and Sustainability; Equality, Diversity and Inclusion
		Up to 5 College-level office holders per College nominated by that College who hold academic posts (for example, Deans and Associate Deans)
		Office-holders who are specifically entitled to Senate membership under the terms of collaborative agreements.
		2 Senate Assessors on the University Court
		1 Academic Staff member on the University Court

Appendix 2

Student membership
(See regulations 5 and 6)

Position	Membership	Membership breakdown
Elected students	30	5 Sabbatical Officers
		8 Section Representatives
		5 Liberation Officers
		6 Undergraduate School Representatives
		6 Postgraduate School Representatives

Senate

8th February 2023

Curriculum Transformation Framework (Undergraduate)

Description of paper

1. This paper provides an overview of the proposed Undergraduate Curriculum Framework developed as part of the Curriculum Transformation Project. It sets out the distinctive elements of the framework (including disciplinary archetypes, challenge courses, experiential learning, enrichment elements and design principles), reports on the feedback and reaction obtained to date, and outlines plans to work with Schools and Deaneries during the remainder of Academic Year 2022/23 to explore their reaction to the framework. This will be used to identify areas needing further work and refinement, and to inform planning and prioritisation of work to develop the infrastructure, regulations, systems and process needed to support the curriculum.

    This will directly contribute to Strategy 2030 outcomes ii, v, vi, and ix, and be relevant to other outcomes including iv, x and xiii

Action requested / recommendation

2. We are seeking Senate endorsement and support for:
    *   the continued development and design of key elements of the undergraduate curriculum framework (programme archetypes, challenge courses, experiential learning, enrichment elements and curriculum design principles); and
    *   the next steps for in-depth engagement with Schools and Deaneries on their response to the framework to inform its further development and the preparation of a detailed plan and timeline for implementation.

Background and context

3. Curriculum Transformation is a major and long term change and investment project for the University. An initial scoping phase (April 2021 to December 2022) has been used to develop an institutional curriculum framework, readiness assessment and benefits case for consideration by Senate and through Standing Committees of Senate and other groups during early 2023.

4. Curriculum Transformation is a key element of Strategy 2030 and the educational mission of the University. Its focus is on ensuring that our students, programmes and institution are able to respond to the demands and opportunities we face in a rapidly changing world. This includes preparing students for future careers that will require adaptability and the ability to work across disciplines and cultures in addition to high levels of specialist skills, and responding to the needs of staff and students to improve and update systems and processes that support teaching and the curriculum.

5. This paper provides an overview of the proposed Undergraduate Curriculum Framework. The framework has been designed to support the achievement of

the Edinburgh Student Vision and in response to the priorities set out in Strategy 2030.

6. The framework has been developed through an iterative process over the last year through discussion and engagement with Senate and its committees, Schools, Deaneries, Colleges, Services, project workstreams and groups, other University committees, networks and groups, and external stakeholders. Work in progress and earlier versions of the framework were discussed at Senate in February and October 2022, and at other Standing Committees of Senate (most notably Senate Education Committee) throughout 2021 and 2022[1].

7. The first iteration of the Taught Postgraduate Programme Archetypes was shared in July 2022 based on the work of the Curriculum Transformation Postgraduate Group[2]. Work on updating and refining these archetypes with members of the University taught postgraduate community will resume later this semester and the results brought to future meetings of Senate Education Committee and Senate.

8. Paper E considers the steps needed to support the successful implementation of curriculum transformation. This includes the timeline and plans for phasing, the development of an investment case and initial findings from an impact and readiness assessment of the regulations, systems, processes and infrastructure needed to support the curriculum.

9. Further information on the Curriculum Transformation Project, including briefing papers and other resources is available from https://edin.ac/curriculum-transformation (open to external visitors) and the curriculum transformation hub: https://uoe.sharepoint.com/sites/CurriculumTransformation (internal audience – staff and students).

Discussion

10. **The Undergraduate Curriculum Framework** comprises degree programme archetypes (that determine the structure of the curriculum) alongside a set of curriculum design principles intended to guide and support the use of the archetypes and other aspects of teaching and assessment. Its purpose is to enable the achievement of the Edinburgh Student Vision (Appendix 1), provide the basis for investment and enhancements of the infrastructure needed to support teaching and curriculum innovation (regulations, approvals mechanisms, systems, policies and processes), and support the introduction of changes that will benefit the student and staff experience.

11. **Undergraduate Degree Programme Archetypes**
    The Undergraduate Degree Programme Archetypes (Appendix 2) are intended to support the achievement of the Edinburgh Student Vison by providing a structure that combines disciplinary depth and achievement with space in the curriculum for exploration and learning beyond the home discipline and a focus on

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[1] Second iteration of Curriculum Framework discussed at Senate Education Committee in November 2022 with most recent update in January 2023.
[2] https://uoe.sharepoint.com/sites/CurriculumTransformation/SitePages/Postgraduate-Taught-Report.aspx

experiential learning and high level skills development.

12. The purpose of the archetypes is to facilitate greater clarity and consistency in our offering to students and enable achievement of the curriculum design principles, sharing of courses across programmes and understanding of the requirements for the infrastructure needed to support the curriculum.

13. The archetypes must be responsive to the requirements of external accreditation, support appropriate and achievable levels of choice and flexibility for students, and respect the expectations and requirements of different disciplines. Testing that the archetypes and the rules and guidance around their use meet these conditions will be a key focus for in depth engagement with Schools during the remainder of Academic Year 2022/23.

14. The curriculum framework includes the requirement that all degree programmes would follow one of **four core undergraduate disciplinary archetypes** (Single, Double, Combined and Single-Restricted Honours).

15. They have been designed to retain and strengthen our commitment to undergraduate programmes built around disciplinary depth and excellence connected to our research and scholarship. All undergraduate programme archetypes include space in the curriculum for challenge courses and experiential learning as an integral part of the student learning experience.

16. The Single Honours archetype includes flexibility in credit weightings between minimum and maximum set limits per year and at programme level. This includes flexibility to increase the disciplinary credit load in years 3 and 4.

17. The Single Honours Restricted archetype would only be available to disciplines with very tight external accreditation requirements (e.g. Medicine).

18. The Double and Combined Honours archetypes provide a route for students to spread their study across two main disciplines. The Double Honours archetype is based upon any permitted combination of two anchor disciplines with no prescribed integration between them. The Combined Honours archetype would include courses or other support intended to link the two disciplines[3] with the requirement that there would be an opportunity for an integrated capstone element that draws on them both.

19. The introduction of **Challenge Courses,** as a core and compulsory element of all undergraduate programmes, will provide an opportunity for students to explore and build understanding of themes and topics outside their home discipline.

20. Challenge Courses will draw on our institutional strengths in research and scholarship and be designed for students from a mix of disciplines. Students will be able to select from a wide range of Challenge Course options from different

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[3] This could include some combination of tailored courses to link the disciplines (e.g. methods), recommendations for existing courses at the interface between the disciplines, and co-curricular support (e.g. via Cohort Leads).

categories (e.g. Global Challenges, Working Across Boundaries, Emerging Disciplines, Ways of Thinking) and will be required to achieve 40 Challenge Course credits by the end of their second year 2.

21. Challenge Courses could be offered by Schools and/or at a University level and are intended to operate at scale (enrolment in the 100s to 1000s). Colleagues teaching these course will be supported to develop appropriate and innovative teaching and assessment methods in line with the Assessment & Feedback Principles and Priorities. The proposed phasing of curriculum transformation will provide us with an opportunity to pilot and test the effectiveness and practicalities of Challenge Courses starting with learning from current courses with similar objectives and audiences. A group (chaired by Professor Sabine Rolle) has been established to develop guidance and oversee the development and piloting of Challenge Courses.

22. **Experiential Learning** figures prominently in the Student Vision and is already a significant and positive element of many degree programmes. We are proposing a two pronged approach to deepen and extend opportunities for experiential learning in the curriculum framework.

23. Firstly a requirement for all disciplinary archetypes to include a minimum of 20 credits of courses that meet a University definition of experiential learning. Building on current practice this could include activities like project work, placements, professional practice and study abroad. This requirement would guarantee that all students participate in an element of experiential learning during their undergraduate education. This is already a strong element of many programmes and we expect that most students will have access to significantly more than 20 credits of experiential learning (core and elective).

24. Secondly that this will be complemented by significant growth in the availability of institutional level experiential learning courses or models. This will include the expansion of existing opportunities (e.g. Students As Change Agents – SACHA, Student-Led Individually-Created Courses – SLICCs, Placements, Work Based Projects, Outreach Courses) and the development of new provision. In time some of these opportunities could be designed to align with or provide interdisciplinary/experiential alternatives to traditional capstone courses in 3rd or 4th year.

25. We expect that some Challenge Courses and enrichment elements will include a strong element of experiential learning.

26. Professor Lesley McAra is leading a group developing definitions for experiential learning, looking at current approaches and exploring the opportunities and consequences of scaling up provision.

27. A key strength of our 4-year undergraduate curriculum is the opportunity for students to take courses outside their home discipline. The inclusion of optional **Enrichment Elements** within the curriculum framework will provide students with the potential to consolidate and build learning across 80 credits of linked courses

running alongside their main disciplinary programme.

28. Enrichment Elements are intended to support innovation and exploration for staff as well as students. One application would be to offer teaching linked to an area of research strength that is below the level of a full honours programme, including teaching in emerging disciplines or linked to interdisciplinary themes. This could provide a stepping stone to the development of new degree programmes.

29. Other potential areas for Enrichment Elements include data skills or languages, and in thematic areas like sustainability and the climate emergency, combining Challenge Courses in years 1 or 2 with experiential learning opportunities in years 3 or 4.

30. Enrichment elements would include a mix of SCQF level 7 & 8 (years 1 and 2) and 9 & 10 (years 3 and 4) courses and would be named on transcripts, with some potentially included in the degree award.

31. **Curriculum Design Principles**
The Curriculum Design Principles (Appendix 3) are intended to inform and support decisions on the selection and implementation of programme archetypes, and to guide decision making and planning at all levels, looking at how the curriculum is designed, developed, and supported.

32. The design principles are intended as prompts to assist programme and course teams, teaching organisations and support services in developing and supporting the curriculum and approaches to teaching and assessment. This includes the introduction of the Assessment & Feedback Principles & Priorities, the achievement of the Edinburgh Student Vision and approaches that support learning at programme level. Guidance and resources (including examples of practice from across the University and sector) are being developed to inform the use of the design principles by different individuals and groups (e.g. programme director, course organiser, teaching office, lecturer, teaching assistant, support service) for specific tasks (e.g. programme design, review, communication, prioritisation & planning).

33. An important theme emerging around the design principles is clarity on the intentions behind their implementation. The Curriculum Transformation Board have emphasised that the use of the design principles and archetypes should support staff and student agency (so be responsive to different disciplinary contexts, enabling colleagues to be creative and use their academic judgment) and increase institutional resilience, particularly the resilience of staff and students (so helping to manage workloads for individuals and introducing systems and policies that make it easier to make changes and remove the need for time consuming workarounds).

34. **Reactions to the Curriculum Framework**
The second iteration of the undergraduate framework was shared and discussed with committees, networks and groups during the second half of semester 1. We also used this period to begin to test the potential impact, benefits and use of the framework with Schools. The insights gathered are being used to plan for in-

depth engagement with Schools and Deaneries during the remainder of Academic Year 2022/23.

35. There is general support for the introduction of archetypes and design principles to support greater consistency in programme structures and as the basis to make enhancements to systems, regulations and processes. These enhancements are seen as key enablers by many staff wanting to innovate and make changes to the curriculum that align with the Edinburgh Student Vision. The Curriculum Framework provides a shared statement of structures and design principles that can be used to guide the development of systems and process that sit within and outwith the formal scope of curriculum transformation.

36. While there remain questions and work to do on the rules around the implementation of specific archetypes (particularly the Double and Combined Honours archetypes) the latest iteration has been seen by many as a positive step. Building flexibility around credit weightings, course design and assessment into the archetypes is seen as a key benefit of curriculum transformation by many, potentially reducing the need to apply for exceptions or seek approval for minor changes.

37. It has been encouraging to see that several of the externally accredited programmes we have spoken with see the potential to adopt the Single Honours rather than Single Honours Restricted archetype. There are specific questions around credit weightings that need to be addressed and we will work on this with programmes and through the external accreditation group. Initial discussions with Schools have highlighted a range of other questions (including how best to support pathway programmes) that will be a focus for the next phase of engagement.

38. An important theme in many discussions has been the potential to use the introduction of the curriculum framework and archetypes to better curate and support appropriate student choice and flexibility. This includes consideration of approaches and systems to rationalise and support course enrolment, including the introduction of Challenge Courses, to better deliver early year elective course choices. We will also test the impact of the archetypes and introduction of Challenge Courses to ensure that we retain the potential for students to transfer between programmes where appropriate, particularly at the end of 1st year.

39. Enthusiasm for the potential of Challenge Courses is growing in terms of the role they can play in broadening the educational experience of students and links to our institutional, particularly inter-disciplinary, research strengths. Several groups of colleagues around the University have started to develop ideas for potential challenge courses linked to areas including sustainability and climate change, data science, critical thinking and food security, and this is in addition to existing courses that align with the Challenge Course concept.

40. The enrichment element concept as presented in the second iteration of the archetypes was too complex. The revised description presented in this paper aligns with what we are seeing as the areas with greatest promise through

discussions with Schools and elsewhere. There is general support for the emphasis on experiential learning, building on what is already an important element of many programmes, with colleagues keen to see the development of a University definition of experiential learning that they can use to support course and assessment design.

41. The proposal to delay the proposed implementation date to September 2026 and introduce an element of phasing to curriculum transformation has been positively received. This is needed to provide Schools with sufficient time to develop plans and responses to the curriculum framework and to fully understand and make the necessary changes to our systems, regulations and policies. The potential to pilot and scale up Challenge Courses, Experiential Learning and Enrichment elements through this phasing has also been welcomed, particularly as it provides an opportunity to test, understand and respond to some of the risks and uncertainties associated with these developments.

Engagement and next steps

42. We will use the remainder of Academic Year 2022/23 to work with Schools and at University level to develop plans for change and investment.

43. Discussions have begun with the three College Education Deans on how best to progress this in their College. Our intention is to work with all Schools to develop thinking around their response to the Curriculum Framework in the short (ready for launch in AY26/27) and medium terms (AY27/28 and beyond). This will include identification of requirements for investment in Schools and priorities for University level investment and enhancement.

44. These discussions with Schools, Deaneries and other groups will be used to further test and validate the Curriculum Framework to identify areas where adjustments and further work are needed.

45. We will undertake work to test the framework and its presentation with recruitment and admissions staff and potential applicants. A key focus of this work is to ensure that the framework supports the development of the Edinburgh Offer, ensuring that we remain the destination of choice for students from all backgrounds, including our commitment to widening participation.

Resource implications

46. Project resources to date have included the project team (including secondees and student interns), use of external consultants for specific tasks (e.g. facilitating workshops as part of the Curriculum Design Principles & Architecture Workstream) and in-kind contributions of time from a large and increasing number of staff and students from across the University. See Paper E for further information on the development of the project investment case.

Risk management

47. Key risks include the readiness and suitability of current University systems and support, along with concerns around capacity and timelines, particularly when considering the demands of running curriculum transformation alongside other major institutional change programmes and as we emerge from the pandemic.

These risks are being monitored and ameliorating actions identified through the use of a risk log reported on to the Project Board.

48. The proposed delay in the full implementation of Curriculum Transformation to AY26/27 and introduction of an element of phasing is in direct response to the identification of these risks and concerns. The AY26/27 launch date should be seen as indicative until work on producing a detailed scope and implementation plan for system dependencies has been produced (this is part of the work plan described in Paper E: Curriculum Transformation Project – Planning).

Responding to the Climate Emergency & Sustainable Development Goals

49. Curriculum Transformation will support a positive contribution to the Sustainable Development Goals (SDG) by the University. Objectives around inclusive and equitable access to education (SDG4), wellbeing (SDG3) and gender equality (SDG5) align with the purpose of Curriculum Transformation and the Curriculum Design Principles. SDG13 (action to combat climate change and its impact) features directly in the Edinburgh Student Vision and through consideration by the Climate and Sustainability group[4].

Equality & Diversity

50. An Equality Impact Assessment (EqIA) for the overall approach to Curriculum Transformation, the organisation and management of the Curriculum Transformation Project was completed in November 2022[5]. Further EqIA will be undertaken as part of the development and implementation phases of Curriculum Transformation (e.g. adoption of Curriculum Framework, linked to major changes in University Regulations, Policies and Systems).

51. A draft EqIA for the Undergraduate Curriculum Framework is in preparation. A commitment to equity, inclusivity and diversity is a key element of the Student Vision and the Curriculum Design Principles. The Curriculum Framework therefore has the potential to make a positive impact in line with University strategic priorities around Equality, Diversity and Inclusion. A change of this scale and complexity also carries with it risks of unintended negative consequences. Both are being considered in the EqIA. This includes the identification of opportunities to advance equality of opportunity and foster good relations through adoption of distinctive elements of the framework (challenge courses, enrichment elements) and the curriculum design principles. This is being accompanied by the identification and amelioration of risks of discrimination or creation of barriers, particularly the risks of unintended negative consequences around the implementation of the framework.

52. Our commitment to addressing social and economic disadvantage is being considered alongside protected characteristics (including age, disability, race, religion or belief, sex, sexual orientation, gender reassignment, pregnancy and maternity) as part of this EqIA.

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[4] https://uoe.sharepoint.com/sites/CurriculumTransformation/SitePages/Workstreams-Overview.aspx#climate-and-sustainability-group
[5] https://uoe.sharepoint.com/sites/CurriculumTransformation/SitePages/Equality-Impact-Assessment.aspx

53. The University Equality Diversity and Inclusion Committee (EDIC) and Senate Quality Assurance Committee (SQAC) will be asked to review and comment on the draft EqIA during semester 2 AY22/23. A revised EqIA, informed by engagement with Schools, Deaneries and other groups, will be taken to EDIC and SQAC during semester 1 AY23/24.

54. We are working with AdvanceHE on the development of an EDI toolkit linked to the Curriculum Design Principles. A particularly focus will be on opportunities to embed EDI in course and programme design.

Communication, implementation and evaluation of the impact of any action agreed

55. In addition to the plans for in-depth engagement with Schools and Deaneries described in this paper the further development and preparation for the implementation of the curriculum framework will be discussed and evaluated through the Curriculum Transformation Board[6] reporting to the University Executive, through appropriate Senate Committees, Senate and Court. In addition to a wide range of institutional communication and engagement activities the project team will continue to work closely with Heads of School, Directors of Teaching, Schools, Deaneries and Services throughout the design and development phase of the curriculum transformation project.

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January 2023

Presenters
Colm Harmon & Jon Turner

Freedom of Information
Open

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[6] https://uoe.sharepoint.com/sites/CurriculumTransformation/SitePages/Who-is-working-on-CT.aspx

Appendix 1 - The Edinburgh Student Vision

The Edinburgh Student Vision

The vision is built around three high level objectives that focus on creating long lasting benefits for our students, alongside a set of core principles for the development of a curriculum that will support the achievement of these objectives by utilising the key strengths and characteristics of our University.

Objectives:
Our vision is for all students to benefit from a curriculum that will result in them being:
- **Disciplinary experts**: with advanced specialist skills, knowledge and experience
- **Ready to thrive in a changing world**: having developed the skills to be reflexive learners imbued with a critical mindset, cultural sensitivity and open to diverse perspectives
- **Highly employable**: can translate experience and capacities to career success, on graduation and beyond, seeking congruence with their own values and aspirations [based on consultation responses this will be broadened to include other dimensions of achievement e.g. entrepreneurial, societal, personal]

Core Principles:
Our curriculum will achieve these objectives through programmes built around the following core principles:
- Supports the development of **self-directed, curious and confident learners**: who are critical thinkers, innovative, agile, resilient, creative and empathetic
- Provides **disciplinary depth, identity & expertise**: with students able to synthesise & apply learning, having developed their specialist knowledge and understanding, research skills and an appreciation of the research process
- Includes **experiential, cross-disciplinary and cross-cultural learning**: with students able to work well with others, understand & use different perspectives, and develop strong communication & collaboration skills
- Has a clear focus on **integrity & is values-driven**: promoting honesty & integrity, equity, inclusion, respect, cultural humility, and a willingness to challenge structural enablement and embedded advantage
- Develops high levels of **digital and data literacy**: with students informed and active, confident in a range of environments and uses, with a mature understanding of ethical and societal considerations
- Builds **understanding and engagement with global challenges** (for example sustainability & climate change): to develop skills in solution design and delivery, able to explain & grasp the relative importance of different actions, work constructively across different contexts and be empowered to take action

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The purpose of the Edinburgh Student Vision is to define a shared ambition for the distinctive qualities and impact of the curriculum for our applicants, students and graduates.

We followed a three stage process to develop the Edinburgh Student Vision. The initial exploration stage took place between July and December 2021. A range of methods were used to draw in a varied and broad a range of perspectives from individuals and groups. Curriculum Transformation workstreams and groups undertook focussed pieces of research and analysis, including a survey of recent graduates and discussions with employers. These insights were shared at a meeting of workstream and group members at the end of November 2021 that led to the

production of a draft vision. A consultation on the draft vision took place between April and June 2022[7] using a range of methods and with different audiences. We have continued to gather reactions to the Student Vision throughout the summer and autumn of 2022, particularly through discussions with Schools and Deaneries.

There has been support for the substance of the vision from the majority of respondents and other stakeholders. This feedback has informed an update of the vision - widening the definition of the third objective beyond employment to incorporate other dimensions of achievement (e.g. self-employment, societal and personal impact) and has been built into the development of the Curriculum Design Principles. This includes the importance of a clear focus on wellbeing, including a stronger emphasis on societal benefits (including through on-programme learning opportunities), consideration of what is meant by disciplinary depth and expertise in this context and its relationship to interdisciplinarity, and how best to make the curriculum distinctive to Edinburgh. Responses to the consultation also highlighted the need for investment in systems and other areas of support for the curriculum and the importance of a robust implementation plan. These points have been addressed in the project implementation plan and proposals for phasing.

Once the Curriculum Framework has been finalised we will test and refine the phrasing and presentation of the Student Vision with a range of internal and external audiences. Potential applicants, including international applicants and those from a Widening Participation background, will be a key focus for this work.

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[7] https://uoe.sharepoint.com/sites/CurriculumTransformation/SitePages/Edinburgh-Student-Vision-Consultation.aspx

Appendix 2 – Undergraduate Programme Archetypes

Four Core UG Archetypes

Range of archetypes (particularly Single Honours Flexible, Specialist & Restricted) intended to address extrinsic (accreditation) and intrinsic requirements for disciplinary depth
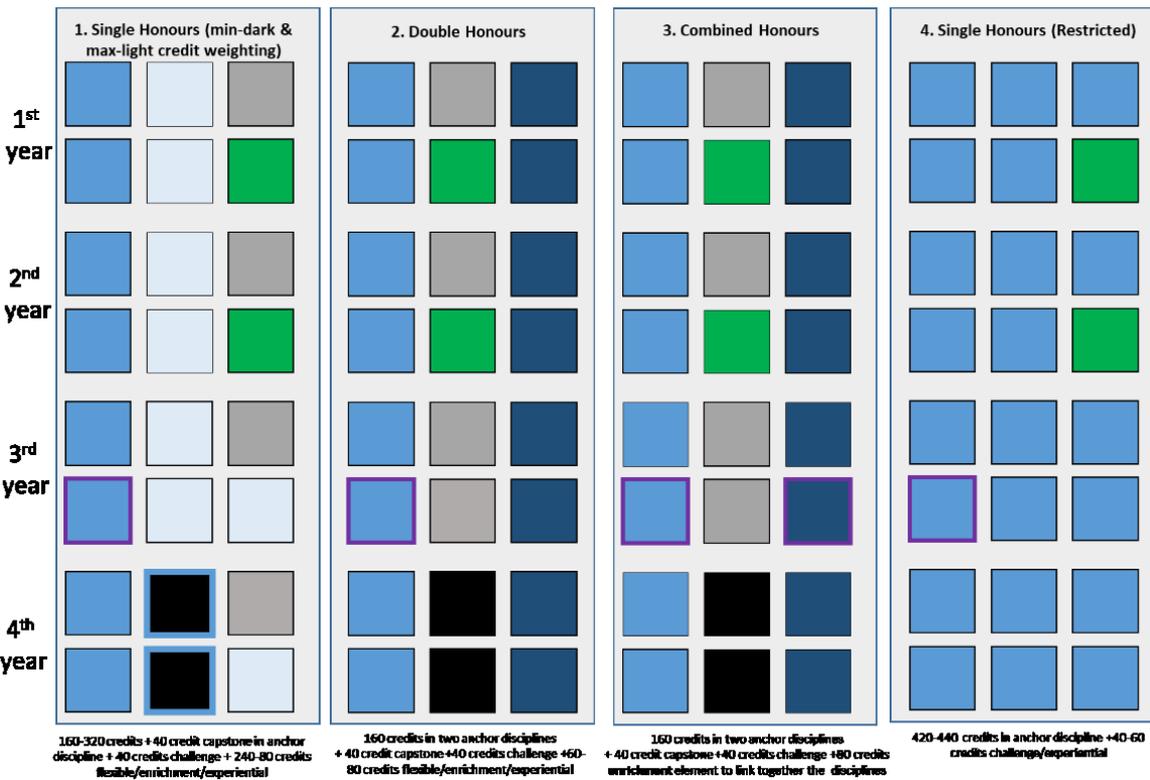
Anchor Discipline(s) in blue minimum (dark) and maximum (light) limits for disciplinary credits

Experiential (purple) can be embedded in anchor discipline as keystone (year 3 or 4) and/or offered as University level option

Challenge courses (green) 40 credits to be taken before end of year 2

Black shading is final year capstone element (with flexibility on what this is)

Grey for unallocated credits (can be used for enrichment elements)

1st year · 2nd year · 3rd year · 4th year

1. Single Honours (min-dark & max-light credit weighting)
160-320 credits + 40 credit capstone in anchor discipline + 40 credits challenge + 240-80 credits flexible/enrichment/experiential

2. Double Honours
160 credits in two anchor disciplines + 40 credit capstone + 40 credits challenge + 60-80 credits flexible/enrichment/experiential

3. Combined Honours
160 credits in two anchor disciplines + 40 credit capstone + 40 credits challenge + 80 credits enrichment element to link together the disciplines

4. Single Honours (Restricted)
420-440 credits in anchor discipline + 40-60 credits challenge/experiential

Notes:

- Courses are presented as 20 credit blocks for ease of illustration.
  This is not intended to rule out other potential course credit weightings.
- The grey shaded blocks represented unallocated or flexible credit within the archetypes. They could be used for interdisciplinary experiential learning, enrichment elements or additional elective courses within or outside the anchor discipline.
- These illustrations show the minimum flexibility associated with each archetype. Further flexibility comes from the potential to include some Challenge Courses (green) within enrichment elements. We anticipate that experiential learning will play a part in some Challenge Courses and enrichment elements.

Appendix 2 – Undergraduate Programme Archetypes

The curriculum framework includes the requirement that all degree programmes would follow one of four core undergraduate disciplinary archetypes (Single, Double, Combined and Single-Restricted Honours).

The following tables illustrate the distribution of different types of credit bearing courses within each of the archetypes. This includes requirements for disciplinary courses, Challenge Courses, space for embedded experiential learning, a final year capstone element (with flexibility on what this is) and areas of unallocated credit (that could be used to accommodate enrichment elements).

Notes:
- Courses are presented as 20 credit blocks for ease of illustration. This is not intended to rule out other potential course credit weightings.
- Areas of unallocated or flexible credit within the archetypes could be used for interdisciplinary experiential learning, enrichment elements or additional elective courses within or outside the anchor discipline.
- These illustrations show the minimum flexibility associated with each archetype. Further flexibility comes from the potential to include some Challenge Courses within enrichment elements. We anticipate that experiential learning will play a part in some Challenge Courses and enrichment elements.

Single Honours

1st year		
Anc (Min)	Anc (Max)	Un/En
Anc (Min)	Anc (Max)	Cha
2nd year		
Anc (Min)	Anc (Max)	Un/En
Anc (Min)	Anc (Max)	Cha
3rd year		
Anc (Min)	Anc (Max)	Un/En
Anc (Min) + Exp	Anc (Max)	Anc (Max)
4th year		
Anc (Min)	Cap	Un/En
Anc (Min)	Cap (Mid)	Anc (Max)

160-320 credits + 40 credit capstone in anchor discipline + 40 credits challenge + 240-80 credits flexible/enrichment/experiential

Key:

Anc: Anchor Discipline (Min/Max Credit Weighting)

Exp: Anchor Discipline contains Experiential Learning

Cha: Challenge Courses

Cap: Final Year Capstone

Un/En: Unallocated Credits that can be used for Enrichment Elements

Double Honours

1st year		
Anc #1	Un/En	Anc #2
Anc #1	Cha	Anc #2
2nd year		
Anc #1	Un/En	Anc #2
Anc #1	Cha	Anc #2
3rd year		
Anc #1	Un/En	Anc #2
Anc #1 + Exp	Un/En	Anc #2
4th year		
Anc #1	Cap	Anc #2
Anc #1	Cap	Anc #2

160 credits in two anchor disciplines + 40 credit capstone +40 credits challenge +60-80 credits flexible/enrichment/experiential

Key:

Anc #1 and #2: Anchor Disciplines

Exp: Anchor Discipline contains Experiential Learning

Cha: Challenge Courses

Cap: Final Year Capstone

Un/En: Unallocated Credits that can be used for Enrichment Elements

Combined Honours

1st year		
Anc #1	Un/En	Anc #2
Anc #1	Cha	Anc #2
2nd year		
Anc #1	Un/En	Anc #2
Anc #1	Cha	Anc #2
3rd year		
Anc #1	Un/En	Anc #2
Anc #1 + Exp	Un/En	Anc #2 +Exp
4th year		
Anc #1	Cap	Anc #2
Anc #1	Cap	Anc #2

160 credits in two anchor disciplines + 40 credit capstone +40 credits challenge +80 credits enrichment element to link together the disciplines

Key:

Anc #1 and #2: Anchor Disciplines

Exp: Anchor Discipline contains Experiential Learning

Cha: Challenge Courses

Cap: Final Year Capstone

Un/En: Unallocated Credits that can be used for Enrichment Elements

Single Honours (Restricted)

1st year		
Anc	Anc	Anc
Anc	Anc	Cha
2nd year		
Anc	Anc	Anc
Anc	Anc	Cha
3rd year		
Anc	Anc	Anc
Anc + Exp	Anc	Anc
4th year		
Anc	Anc	Anc
Anc	Anc	Anc

420-440 credits in anchor discipline +40-60 credits challenge/experiential

Key:

Anc: Anchor Discipline

Exp: Anchor Discipline contains Experiential Learning

Cha: Challenge Courses

Cap: Final Year Capstone

Un/En: Unallocated Credits that can be used for Enrichment Elements

Appendix 3 - Curriculum Design Principles

Curriculum Design Principles

1. Be future ready

The next decade and beyond will bring unprecedented systemic changes to bear across the world. Is our approach resilient enough to adapt and respond at pace? Are our students, programmes and institution better prepared as a result?

2. Extend our impact

We are a force for change recognised globally. More than delivering high quality learning, being part of the UoE means actively learning to shape the future in areas like climate change, sustainability and social equity. Does our approach enable this to happen? How can we foster positive citizenship and give more agency to our students, programme portfolio and institution?

3. Foster disciplinary community & belonging

We value each and every discipline, large and small, and the community they create both within and outside of Edinburgh. We adopt an inclusive, welcoming approach and encourage connections.

4. Learn across boundaries

Complex social challenges require collaboration and curiosity, that's why we have a wealth of opportunity and knowledge at our fingertips that extends beyond traditional roles, disciplines and pathways. Not only that, but our students are changing too with different routes in and out of education. Our job should be to chart a path through this that delivers powerful outcomes and meaningful experiences at Edinburgh.

5. Focus on needs, inclusivity and wellbeing

The experience of studying and teaching here is as important as the content itself. We take the time to understand what students, staff and stakeholders need from us. We are welcoming and mindful of truly diverse needs and perspectives.

6. Amplify Edinburgh's excellence

Edinburgh has an incredible heritage, disciplinary excellence and place in the world. How can we identify what is distinctive about Edinburgh and our University and take full advantage in programmes, courses and day to day experiences and connections.

By doing this, we can give...   **student & staff agency & consequence**   which in turn creates a...   **resilient institution**   driven by our principles

Senate

8th February 2023

Curriculum Transformation Project – Planning

Description of the paper

1. This paper sets out the proposed approach to develop the case for investment, phased implementation and risk management to support the successful delivery of the curriculum framework in a way that delivers the intended benefits for students, staff and the University.

Action requested/recommended

2. We are seeking Senate endorsement and support for the continued development of the case for investment, phased implementation and risk management needed to support the delivery of the curriculum transformation project.

Background and context

3. Curriculum Transformation is a major and long term change and investment project for the University. An initial scoping phase (April 2021 to December 2022) has been used to develop an institutional curriculum framework, readiness assessment and benefits case for consideration by Senate and through Standing Committees of Senate and other groups during early 2023.

4. Within the Curriculum Transformation Project there is a workstream called 'Supporting the Curriculum'. This workstream has primarily focussed on the changes required to our policies, processes, systems and data in order to support the implementation and delivery of the proposed changes to the curriculum. It has also taken responsibility through the project team for the development of the investment case, impact assessment, benefits, emerging timeline and risk management, reporting back through to the Project Board. This work has necessarily been dependent on the development of the curriculum archetypes in particular and as such some of the detailed analysis has only recently started.

5. The Project Team have taken the opportunity to embed learning as we have progressed. This has included engagement with Schools within the University to understand the approach they have taken locally to curriculum reform and also engagement with a small number of other UK and international Universities who have undertaken projects similar to curriculum transformation. This is helping inform our approach to the work set out in this paper.

Discussion

6. The University's Risk Policy and Risk Appetite document states: Major Change activities (e.g. projects, collaborations, mergers) – Major change activities are required periodically to develop the University, and to adapt to changes in the regulatory and technological environment and in the nature and conduct of the University's activities. The University expects such changes to be managed in accordance to best practice in project and change management, and has low appetite for deviating from such standards.

7. An investment case will be developed to support decision making on the implementation of the proposals set out in the curriculum transformation project. This investment case will set out the assessed impact of the changes being proposed and the scale and complexity of the work being proposed – through the development and completion of impact and readiness assessment(s); set out the key project decisions and assumptions that are underpinning the case for investment and the approach for monitoring these and assessing the impact of any changes; set out the expected benefits the project sets out to deliver for students, staff and the university including relevant benchmarking data where this is available and agreed; alternative approaches that have been considered; risks and issue management; and implementation approach.

8. A phased plan and timeline will be developed as part of this process which will be underpinned by an implementation approach/structure which will need alignment across the main budget areas impacted by the changes. The Project Board agreed the recommendation to move away from the indicative implementation date of September 2025, with revised full implementation date to be confirmed once detailed planning on critical activity has been completed – including essential system changes.

9. A phased implementation provides opportunity to ensure benefits can be fully realised by focusing on outcomes we are seeking to deliver rather than being driven by a particular timeline, noting this may include delivering some benefits earlier than originally planned - for example introducing a scaling up of distinctive elements of the new curriculum through pilots (e.g. challenge courses); provide a way of managing some of the key project risks around work and resources required to deliver the project; and support alignment with work already underway and/or planned including the student support project and digital strategy. However within any phased implementation plan there will be some aspects that will need to be rolled out at the same time across all Schools in the University (for example adoption of new regulations, arrangements for admissions); we will need to guard carefully against a phased plan resulting in scope creep and/or for the project to run longer than required.

10. Further information on the approach to the resource and risk management part of the investment case are set out in the sections below.

11. The team(s) and engagement required to develop and then test the case for investment, implementation timeline and risk management and mitigation are being finalised and this will necessarily involve engagement across the budget areas and with experts in different parts of the University. This is in line with the engagement strategy that has been undertaken to date by the project sponsor, board and teams.

Resource Implications

12. A project team has been in existence during the 2021/22 and 2022/23 academic years. As with all projects the team have asked for and required support from colleagues across the organisation to attend workshops, engage with papers and proposals, attend board meetings and represent areas/bring their expertise to project workstreams and the board itself. This includes regular engagement with the Directors of Teaching, Heads of School, Heads of College as well as a significant number of presentations to Schools and Departments, to ensure they remain close to, and can help shape, the development of the project. We note our thanks to staff, students and alumni who have supported the development of the project to date and the level of engagement has been extremely positive.

13. The project spend in 2021/22 was circa £665k against a budget of £900k and to date in 2022/23 the projects has spent £335k against a budget of £1.5m with the second half of the year forecast to have a higher run rate than the first half.

14. These costs include expenditure on external consultants of approximately £150k, covering the activity secured via three individual procurements for services with costs between £5k and £50k excluding VAT (one each with companies called Nous, NileHQ and AdvanceHE) and initial engagement with Tribal, the supplier of the student record system.   The remainder of the project spend to date is a combination of the project team, academic and PhD secondments to support project delivery.

15. As set out above an overall investment case for the Curriculum Transformation Project is being developed to set out the forecast investment, with contingency, to deliver the key components required to implement the reformed curriculum proposals in full and/or in part.

16. The investment case will need to set out a forecast of the resource required to implement the proposals and be kept under regular review through the appropriate governance mechanisms. It is likely that resources will fall into three broad areas: allocation/prioritisation of existing resources where time and expertise will be required to be prioritised on the changes being implemented through the project; one-off costs associated with the changes being implemented in schools, services and/or project team over and above prioritisation of existing resources; and recurring costs, relating to any ongoing resource required to maintain elements of the curriculum reform following implementation. The assumptions/approach underpinning these broad areas have to be worked through.

17. The 2023-2028 planning template which has recently been issued requests commentary on the performance against the 16 KPIs set out in the Strategic Performance Framework. The planning round process seeks commentary from the budget areas which conveys, for each KPI: how they are helping align activity around delivery of performance change; and what risks there are to achieving performance change/University ambitions.

18. The impact and benefits delivered through Curriculum Transformation is one of the KPIs and while work has to be completed to develop the detailed KPI, in this planning round budgets areas have been asked for the information below and following submission this will be reviewed to further enhance understanding and assessment from each budget areas.
    a. *Alongside the work on design principles and architecture for the Curriculum Transformation Programme, we are developing a small number of measures against which we can measure our progress. We will select a headline measure for including in this Strategic Performance Framework with the aim of being able to report from a baseline perspective in our mid-year report in April 2023, or our year-end report in Autumn 2023.* Please note the ways in which you are engaging with CTP, your thoughts on engagement required by your area to successfully deliver the programme (noting that it is emerging), and what impact you will see over the period covered by this Plan.

Risk management

19. The project team maintain a risk register which is reviewed, presented and discussed at the Curriculum Project Board in addition to follow up actions with the risk owners and those responsible for taking any actions set out to mitigate the risks. As part of

any investment case a revised risk and issue register will be presented to inform decision making.

20. The risks highlighted at the last Project Board include (note the mitigations are not set out here):

    a. Uncertainty regarding the scale, scope and requirements of the curriculum transformation project;
    b. Capacity to engage appropriately to support development, decision making and implementation of the requirements of the curriculum transformation project;
    c. Lack of alignment between the demands of 'business as usual', Curriculum Transformation Project and other major projects on staff capacity and prioritisation of effort;
    d. The critical path of activities for implementation is not yet fully developed, tested and resourced, impacting on assurance on implementation timelines;
    e. Impact on systems, processes and data are not fully understood and unless sufficient time and resource allocated this will impact on critical path of activities and implementation timeline;
    f. Impact of any unintended consequences on size, shape, and diversity of student body and tuition fee income as a result of changes through curriculum transformation project.

Provision of strategic change and continuous improvement support

21. In recognition that the University needs to improve its approach to the management of large-scale change, an initial paper was brought to the University Executive which set out recommendations for future provision of strategic change and continuous improvement support. These initial reflections and recommendations will necessarily require broader engagement and input from colleagues in different parts of our University, with those discussions helping us shape a more effective approach to strategic change and continuous improvement in the future.

22. The paper is attached as appendix 1 for information.

23. Curriculum Transformation has and continues to implement lessons learned from other projects in consideration with the nature of the work required to implement this type of initiative in our University.

Responding to the Climate Emergency & Sustainable Development Goals

24. Curriculum Transformation will support a positive contribution to the SDGs by the University. Objectives around inclusive and equitable access to education (SDG4), wellbeing (SDG3) and gender equality (SDG5) align with the purpose of Curriculum Transformation and the prototype Curriculum Design Principles. SDG13 (action to combat climate change and its impact) features directly in the Edinburgh Student Vision and through consideration by a Climate and Sustainability working group.

Equality and Diversity

25. An Equality Impact Assessment (EqIA) for the overall approach to Curriculum Transformation, the organisation and management of the Curriculum Transformation Project was completed in November 2022[1]. Further EqIA will be undertaken as part

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[1] https://uoe.sharepoint.com/sites/CurriculumTransformation/SitePages/Equality-Impact-Assessment.aspx

of the development and implementation phases of Curriculum Transformation (e.g. adoption of Curriculum Framework, linked to major changes in University Regulations, Policies and Systems).

Communications, implementation and evaluation of the impact of any action agreed.

26. The development of the investment case will require in-depth engagement with Colleges, Schools and Deaneries, and Professional Service Groups and preparation of the implementation of the curriculum framework will be discussed and evaluated through the Curriculum Transformation Board[2] reporting to the University Executive, through appropriate Senate Committees, Senate and Court.   In addition to a wide range of institutional communication and engagement activities the project team will continue to work closely with Heads of School, Directors of Teaching, Schools, Deaneries and Services throughout the design and development phase of the curriculum transformation project.

Author

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Director of Strategic Change
31 January 2023

Presenter

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VP Students

Freedom of information

Open paper

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[2] https://uoe.sharepoint.com/sites/CurriculumTransformation/SitePages/Who-is-working-on-CT.aspx

UNIVERSITY EXECUTIVE

8 November 2022

Recommendations for future provision of strategic change and continuous improvement support

Description of this paper

1. This paper sets out recommended actions to refine and enhance the provision of strategic change and continuous improvement capabilities and capacity, in terms of the central function and across the University, aligned to supporting effective delivery of Strategy 2030.

2. Throughout the paper we use the term 'strategic change projects' because this term is familiar within the University. We believe this term may be seen in some areas as a barrier in itself and alternative approaches to this are set out in the discussion section.

Action recommended/requested

3. The University Executive is asked to **comment on and endorse** the recommendations and the next steps set out in the paper.

4. In relation to these, the prioritised next steps will be:

   a. Work with SLT and the Executive to identify enhancements that can be made to our strategic change planning process as our planning round process commences (recommendations set out in paragraph 8a and 8b);
   b. Work with colleagues to draft a terms of reference for the proposed strategic change delivery/portfolio board (recommendation set out in paragraph 8c);and
   c. In addition to the above, ask Gillian Richardson, the Head of Change Implementation, to work in consultation with colleagues to produce a redesigned approach/service proposal which will be brought to the University Executive when ready.

Background and context

5. There is significant disaffection with the way some of the larger initiatives under the banner of strategic change projects have been developed and delivered at the University in recent years, including current experience with the final phase of the implementation of the long-running People & Money programme. While lessons are being learned and applied, e.g. in areas such as student support and curriculum transformation, there is recognition that more needs to be done to improve significantly the quality of the journey to deliver strategic change projects as well as ensure the identified beneficial outcomes to be delivered from them.

6. We are a large, successful University with an ambitious strategy. We must continue to innovate and evolve to deliver clearly defined opportunities that will contribute to

the delivery of strategic objectives through to 2030 and beyond. This is reliant on a plan which sets out the clear actions we need to take to develop our capacity and capability as enablers to deliver on strategic priorities.

7. We have undertaken some benchmarking activity, initial review of lessons learned and sought feedback internally. A short discussion paper was developed in mid-2022 and sessions were held to gather feedback from senior managers across Colleges and Professional Service areas. While there are differences in view and emphasis in discussion, there are a number of areas where consistent points were made around areas for improvement. These include:

   a. There is a large number of initiatives operating at the same time, at least in appearance without co-ordination or consideration of the cumulative impact on workloads, particularly those most involved in change initiatives.   This is causing workload and capacity issues in our business-as-usual operations and impacts on our ability to deliver effective outcomes from strategic change projects. This is particularly acute where there is a dependency on a small number of roles – for example Directors of Professional Services, or specific teams for example HR, IT, process/functional experts.
   b. The pace and/or effectiveness of strategic change projects is perceived as too slow and too expensive and we are often dissatisfied with the outcomes of our effort and the ability to deliver and embed the enhancements we set out to achieve – behaviours, leadership, capacity, capabilities are often mentioned as causes of this as well as an insufficiently deep understanding of business operations.
   c. The financial/resource cost of these activities is often not well understood or only partially developed and expressed – for example the project team resource is 'counted' but not resource necessarily expended elsewhere.
   d. While it is necessary to have visible sponsors and senior responsible officers (SROs), expectations of shared responsibility and leadership are not routinely set, applied and met.
   e. There is often an absence of a clear link between our academic mission and any change programme being proposed, with the consequence that a compelling vision is often absent. The current set of priorities are not clearly defined, visible to colleagues, nor the links to delivery of Strategy 2030 evident.
   f. Colleagues often think the planning round and development of change projects operate independently of one another. Further, the rationale for undertaking these activities and the inter-dependencies between them are often poorly understood, and we have an insufficiently clear pipeline of work for the coming years which is effectively linked to planning processes and our capacity. Examples of what colleagues categorised in this area include: People and Money and HR/Finance Transformation, Student Support Project, Curriculum Transformation, Student Recruitment & Admissions improvements, Growing Research Together, development of the Digital Strategy and the People Strategy, and scoping activities on communications and marketing services.
   g. We do not have an effective categorisation of initiatives and nor do we reach a clear definition or scope of what we are delivering early enough.
   h. We do not have an effective enough feedback loop from projects and initiatives undertaken in the past: specifically, collation of feedback, synthesis of visible lessons learned, and - on the flipside - where successful delivery builds appetite to do more.
   i. We can always do more to reflect on the impact on people within the organisation, consider their workload, as mentioned above, and improve their

experience. We can also do more to ensure centrality of equality, diversity and inclusion imperatives and, now that we have them, alignment with the principles of our People Strategy.

Discussion

8. Discussion with colleagues also focussed on what recommendations could be made to improve the issues noted above. These recommendations were developed into a paper which was taken to SLT in late September 2022 and are set out below:

    a. **Ensure a clear link between the strategic projects we undertake and how these support the delivery of Strategy 2030, the delivery of our academic purpose, contribute to our performance indicators, and align with the planning round.** This will require a combination of top down and bottom up planning but we can better align the planning for strategic project delivery and the planning round itself. Fundamentally, we should have a clear line of sight from academic purpose to the changes we undertake, even if these changes appear wholly embedded in areas which are not about direct academic delivery.

    b. **This should lead to the identification of a small, clear, prioritised set of strategic change projects with clarity on the intended outcomes (pursuit of opportunity or risk avoidance) we are seeking to achieve. It is critical that we can see a pipeline/roadmap.** A pipeline/roadmap of visible strategic change projects approved or under consideration/feasibility spanning a number of years will provide better visibility and support planning. Ideally, the pipeline/roadmap, would not simply be a view of strategic change projects but also other large Estates, Digital, Colleges' initiatives tied to the planning process, clearly categorised to give visibility of the whole.

    c. **A strategic project change delivery/portfolio board should exist.** This should define and have oversight of the whole portfolio of initiatives. This Board should have the capacity to look at the strategic change portfolio(s); drive prioritisation and provide better co-ordination of the dependencies and timing of strategic projects; have the capacity to start, stop, continue projects; ensure due diligence/feasibility is undertaken before launching; provide delivery rigour/challenge to help overcome challenges, mitigate risks, deliver on a more agile basis and provide effective quality assurance. **This should provide improved visibility of priorities** to the organisation, demonstrate co-ordination and prioritisation. **Convenorship of such a board will be sufficiently neutral in terms of budget area that it is clear that 'ownership' of change is broad.**

    d. **Leverage and build the capacity, capability and experience within the organisation.** At the moment we do not have all the right skills in this area and project and other teams operating in this space but independently of one another. This should include:
        i. An appropriately sized and skilled professional central team with key capabilities to deliver effective strategic change projects, programmes and portfolios, continuous improvement, delivery support to the SLT, Executive and budget areas; the effective planning, quality assurance and benefits management associated with that activity; and the delivery rigour and challenge associated with effective delivery units. There is a value is balancing these technical skills with operational

        knowledge and expertise. These resources should be available to support all areas of the University.

   ii. Senior level capacity in some/all of the six budget areas with a hub and spoke arrangement with the central team to ensure high-quality training, professional standards and alignment on agreed priorities, as well as the opportunity to build capacity across the organisation to 'just do it' particularly in relation to continuous improvement, service improvement and process improvement.

  iii. Use of internal academic expertise to enhance the delivery of strategic projects and the likelihood of success.

  iv. Drawing down as necessary externally on resources and capabilities that we so not have internally (and would not necessarily wish to have in-house on a permanent basis) but may be required from time to time.

e. **Build our capabilities.** Some of our capabilities need enhancement, including establishing a more consistent approach to internal consultation to ensure this adds value and is seen to add value; establishment and management of larger projects and initiatives; delivery in complex organisations; benefits management and delivery; and delivery of user-centred design/service design approach to professional services and our services, processes and systems.

f. **Build capacity and capability across managers by investing in a consistent approach to training and engagement.** We are asking more of managers in relation to strategic change and we have not necessarily been able to invest in the training and support that they may need to be effective – this could be for sponsors/senior responsible officers through to Directors/Managers implementing change in their local areas, and could include anything from HR policy refresher training to continuous improvement methodologies to change management approaches.

g. **Build a better explanation of what we are doing and why.** There is a gap in setting out clearly what work we are undertaking, what we expect to achieve, how it supports the delivery of Strategy 2030, why it matters to the academic mission, the inter-dependencies and expectations on how we work together to deliver. The strategic delivery/portfolio board can take a hold of a clear communication strategy to enable colleagues in the University to understand what we are doing at any one moment in time.

h. **Work with distributed leadership.** Work with the distributed leadership group to deliver effective change through empowered accountability, and prior to that ensure we engage and understand barriers or unintended consequences of change.

i. **How this work is undertaken.** A number of the points set out here are procedural/organisational changes and these are important. It is also important that we focus on how this work is undertaken. There is a need for a set of principles to which we call all subscribe. Areas covered may include: change done with people rather than to people; effective, defined consultation; approach to decision making and applying decisions; setting out leaders' accountabilities and responsibilities in a complex system of ownership.

j.   **We need to be able to talk about failure and lessons learned.** Lessons learned are not always holistic, visible, shared or put effectively into practice. A number of the issues we run into are predictable but we do not or cannot always address these effectively. Lessons learned cannot just be retrospective; they need to be built in throughout the work being undertaken at key stages in decision making process and need to survive from one project to another.

k.   We know there can be a reaction against terms such as 'strategic change projects' and 'transformation'. **A focus on project delivery/service improvement/enhancement** may land better in the University. Often programmes/projects are seen as a once in a decade opportunity to resolve particular business issues. This can lead to an overly ambitious scope and contributes to reduced project delivery. It also fails to recognise that organisations, like a University, are changing and innovating all the time, constantly needing to refine working to be competitive in an uncertain and challenging sector. Changing the balance in favour of seeing a project or initiative as the enabler for further improvement is likely to help with the perception of how change lands.

9.   It will take time to implement these types of recommendations and it can be viewed as our capability and capacity moving through a maturity curve over the next few years.

Resources

10.   The immediate set of actions set out in this paper under paragraph 4 can be accommodated within existing resources.

Risk Management

11.   This paper includes some of the mitigations that have been recommended in relation to the strategic risk: 'Scope, pace and complexity of change negatively impacts both project success and staff wellbeing' which sets out the following:
   a.   Risk causes: the volume and/or timing of change projects are not aligned with budget areas capacity or priorities to implement; and poor, partial or slower implementation of key strategic projects including People and Money, Student Support Project, Curriculum Transformation, and Growing Research Together; and
   b.   Impact consequences: increased project costs and timelines; reduced benefits; negative impact on staff wellbeing; and lack of appetite for further change.

Responding to the Climate Emergency & Sustainable Development Goals

12.   The recommendations would not hinder the achievement of any of the UN SDGs and may provide us with an opportunity to think through how we embed this thinking into our strategic change projects as we are doing with equality, diversity & inclusion.

Equality & Diversity

13.   As part of the Adaptation & Renewal work we took steps to seek to embed ED&I within our strategic change activity and this has continued since, most notably in work on curriculum transformation and student support. The immediate actions and

recommendations set out above provide further opportunity to embed EDI within strategic change.

14. In addition, an EqIA will be produced as part of the development of the work on the recommendations as we start to think through the steps to operationalise these.

Consultation

15. In February 2022 a discussion paper was shared with a small group of senior colleagues which contained a number of issues and recommendations covered in this paper.

16. In May 2022 two informal meetings were held following feedback on a further iteration of the paper developed in February 2022 and this included a number of colleagues including (roles at that point in time): VP Students; VP Corporate Services Group; VP, Chief Information Officer and University Librarian; VP Strategic Change and Governance and University Secretary; VP and Head of College of Science and Engineering; VP and Head of College of Medicine and Veterinary Medicine; Director of HR; Interim Deputy Secretary, students; 3 x College Registrars; Director of Edinburgh Research Office; Director of Legal Services; Head of School of Mathematics; Director Communications and Marketing; Director of Strategic Planning and Insights.

17. In September 2022 a paper was presented at SLT which contained most of the detail covered in this paper presented at the Executive. This further refined paper has been shared for comment between the Provost, VP Corporate Services and Director of Strategic Change.

Further information

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SENATE

8 February 2023

Senate Oversight of the Curriculum Transformation Programme

Description of paper

1. This paper clarifies Senate's role in regulating and superintending the teaching and discipline of the University in respect of the Curriculum Transformation Programme (CTP). It proposes to reserve formal approval of the package of regulatory and academic policy changes to full Senate, with interim approval of the direction of travel at the May 2023 meeting of Senate following a high-level review of CTP's approach, challenges, necessity, and pathway to success.

Action requested / Recommendation

2. Senate is asked to note the welcome proposal from the Senate Education Committee's January 2023 meeting to push back the working timeline for full implementation of the curriculum framework for undergraduate programmes by one year to September 2026. The authors have not had sight of papers for the February full Senate meeting expected from CTP but we understand that Senate will be invited to approve this change at this meeting via one of those papers; if not, Senate is asked to approve the change formally herewith.

3. Senate is asked to approve the following motions:

    3.1. That formal approval of the package of strategic, regulatory, and academic policy changes relating to the CTP, and all other such changes from the CTP under Senate's remit, be reserved to full Senate, superseding any implicit or explicit delegation of such matters to the Senate Standing Committees. (The authors understand an endorsement of some components of the curriculum framework is expected to be submitted by the CTP team for approval at our current, February 2023, meeting; this motion extends that welcome step into a formalised expectation.)

    3.2. That the delayed implementation of the programme be used as an opportunity to review the CTP approach in order to minimise the risk of the final CTP design failing to meet approval with Senate. A review should articulate the fundamental problems that CTP seeks to address, progress made towards a solution, the level of engagement with and support from the wider academic community, and how successful delivery of the programme will be measured. (The authors understand a framework for such a review is intended to be presented by the CTP team at our current, February 2023, meeting.)

    3.3. That the outcome of this review be discussed at the May 2023 meeting of Senate along with a motion to approve the direction of travel subject to any revisions arising from the review.

Background and context

4. A proposal for 'curriculum reform' was presented for discussion at Senate in October 2018 as part of a 15-point action plan entitled 'Enhancing the Student Experience'. This item was prompted by an apparent 'broad recognition that we need to review curriculum structure and pedagogy' and 'would be a large, medium-term project for the new VP [Students] to lead.'

5. Following appointment in 2019, the incoming VP Students led a conversation with colleagues in the University around curriculum structure, pedagogy, graduate outcomes and related topics. This conversation was summarised in a briefing paper, published in October 2021 on the Curriculum Transformation Hub. Key themes in this

document are the need for graduates to be equipped to tackle 21st century challenges, a bewildering complexity in the pathways through our degree programmes, and the lack of opportunities for cross-disciplinary learning experiences as the curriculum is currently constructed. No further briefing papers since October 2021 have appeared on the Curriculum Transformation Hub, which was meant to be a forum for communication and engagement across the university with CTP (and can accordingly be taken as one measure of the extent and robustness of this engagement). The Question of the Month feature of the hub, intended as a broader opportunity for gathering ideas, has amounted to two questions since launching in May 2021, some 21 months ago. The second question seems not to be visible at present, but included a mix of proposals and critical feedback.

6. Meanwhile, several workstreams have been set up within the programme, notably the Curriculum Design Principles and Architecture workstream, which has recently developed some degree programme archetypes. CTP Groups have produced reports and proposals, notably the recent Assessment and Feedback principles.

7. The CTP has unrolled over an unusually challenging period for staff, which has limited the available time for the 'blue skies' thinking that CTP invites. These challenges include a rapid wholesale conversion of teaching to online and hybrid delivery formats, increased student intake due to variations in school assessment, disruption to assessment and feedback activities arising from the implementation of new Extensions and Special Circumstances systems and procedures as well as firefighting the myriad flaws of the People and Money system. This period has also coincided with a long-running industrial dispute, including strike action and action short of strike, which has been a major obstacle to effective inclusion and participation in strategic change projects including CTP. These obstacles have been reflected in low rates of participation in CTP consultation activities.

Discussion

8. Communications from the Curriculum Transformation Groups, and updates to the Curriculum Transformation Hub, have been rather sporadic, and it has been noted at the November 2022 meeting of Senate Education Committee that there are questions amongst staff around 'what problem the University was trying to fix' with CTP.

9. Although Senate has been provided with updates on CTP by the project Board, time constraints have frequently precluded significant discussion during Senate meetings.

10. The scale of the changes to curriculum and pedagogy is likely to be large and to cut across the remit of all three of Senate's Standing Committees. Given this, and the fact that the full Senate has not yet been asked to approve this cycle of curriculum reform, or the Curriculum Transformation Programme specifically, a holistic review by the full Senate is an efficient and effective way to ensure that approval is coherent, comprehensive, and institutionally legitimate.

11. Thus, to ensure legitimacy of any changes arising from the Curriculum Transformation Programme, we propose that formal approval of the final, complete package of regulatory, academic policy and other changes within Senate's remit be explicitly reserved to full Senate.

12. To minimise the risk of the project falling at the final hurdle, now is an ideal time for the Curriculum Transformation Board to take stock of what has been achieved so far and to present an interim report on this progress at the May 2023 meeting of Senate. This report should consider the fundamental problems that CTP seeks to address, progress made towards a solution, the level of engagement with and support from the wider academic community, and how successful delivery of the programme will be measured. We note that the budget already allocated for the secondment of the Director of IAD to CTP would support this review work.

13. The May 2023 meeting of Senate should provide an opportunity for robust discussion of the state of the programme, followed by an opportunity for Senate to approve the direction of travel formally.

14. We note that confidence in the University Leadership's approach to change management is currently running low due to the implementation challenges around the HR and Finance Transformation. A period of engagement with the University community around CTP, and a sense of shared ownership of the project by Senate, may help rebuild this confidence.
15. Quite simply, no curriculum transformation, however thoughtful and ingeniously designed, has much prospect of success without the wide embrace of those staff putting the curriculum into practice. Proceeding in a way that will convince and motivate staff is thus of utmost importance.

Resource implications

16. This involves a short-term reprioritisation of resources to ensure that ongoing expenditures of resources on CTP and the commitments CTP may entail are not wasted.

Risk Management

17. This paper addresses the serious risk of CTP programme failure and its associated consequences for the success of the university's teaching and learning operations.

Responding to the Climate Emergency and Sustainable Development Goals

18. Supports the curriculum-level response by preparing conditions for the success of curriculum projects.

Equality and Diversity

19. Supports curriculum-level efforts by preparing conditions for the success of curriculum projects.

Communication, implementation and evaluation of the impact of any action agreed

20. Actions will be taken forward by the CTP Board and subsequent Senate considerations will be facilitated in the normal course of business by Senate Support.

Consultation

21. Discussions among elected Academic Senate members.

Further information

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To be determined.

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OPEN

SENATE

8 February 2023

Senate Role in the Response to People and Money Crisis

Description of paper

1. This paper notes actions taken by members of Senate to promote an effective response to the significant and ongoing academic consequences of the failed implementation of the People and Money infrastructure. It articulates an ongoing Senate prerogative to be fully informed and involved in the response as an academic matter.

Action requested / Recommendation

2. Senate is asked to note the attached letters, signature lists, and evidence collected from the university community regarding the academic costs of the failed People and Money implementation.
3. Senate is asked to adopt the following motions:
    3.1. In view of the concerns raised by Senate members on behalf of university staff regarding People and Money, the responses and commitments provided to Senate are not an adequate foundation for confidence in the university executive's approach to resolving and accounting for the academic consequences of the People and Money implementation.
    3.2. Senate expects to be duly informed of all measures affecting teaching, learning, and research from the People and Money crisis, to be consulted where appropriate, and to have approval (together with Court and/or other relevant parties) of academic-related responses.
    3.3. Senate expects to be duly consulted and to have approval of the process and outcome of a thorough review of the causes and effects of academic-related impacts of the People and Money implementation. This should not preclude other review processes from proceeding as appropriate under other auspices.

Background and context

4. In July 2019, the university announced that it was moving its core finance and human resource (HR) functions to Oracle Cloud Applications. The aim was stated to be to "deliver smarter ways of working, take advantage of data driven insights to enhance decision-making and quickly and easily access new innovations in finance and HR."
5. Phase 1 of the People and Money system for HR processes went live for all staff in November 2020. Phase 2 for Payroll and timesheets was launched in April 2022.
6. Concerns regarding Phase 1 and 2 of the People and Money implementation were raised both informally, and formally in all staff Q and A sessions on 11 November 2021 and 4 April 2022. At the November 2021 session, concerns were raised regarding staff not being correctly paid, the difficult and time-consuming nature of using the new system and the lack of proper training prior to the system being implemented for HR processes. At the April 2022 session, justification of the necessity of the HR system shut-down was requested and a warning regarding the payment processes now in-place for postgraduate student stipends was issued.
7. In August, the university undertook Phase 3 of the implementation of the financial infrastructure software People and Money. This constituted a major shutdown of financial processing at the university between 22 July and 31 August 2022, as data was transferred from the old system to the new People and Money platform.

8. The roll-out of the new system was delayed from the original launch date of 15th August 2022, cited to be because "Following final rehearsals it is clear that more time is needed to complete the essential detailed tasks that need to be undertaken to launch the new processes". Whilst introductory sessions to the software were held during this period, there was no opportunity for professional services or academic staff to access the system before launch.

9. In the week prior to launch, staff were informed that there was a backlog of requests and payments to process due to the period of downtime and the use of interim processes over the five weeks required for the transition from the old system to the new one. It was stated that schools and departments had held back non-essential transactions over this period

10. In the weeks following the launch, as staff struggled with learning the new system, the backlog in payments continued to grow. This resulted in non-payment of suppliers to the university, resulting in black-listing of the university and a cessation of supply of essential goods and services. There were a considerable number of instances of postgraduate stipend payments for September and October not being received by students who relied on them to cover their cost of living. A number of postgraduate students who had incurred significant university-business related expenses during the financial shut-down faced long-waits for reimbursement. These issues resulted in negative social media and press coverage of the university in late October and November 2022.

11. Ongoing concerns prompted the academic members of senate to compose a letter to the Principal, Senior Leadership Team and Rector (as convener of Court), detailing the numerous issues and impacts of the People and Money system implementation. This was signed by 77 members of senate and was opened up to co-signing by the wider university community, via an online form with a free-text comment section.

12. This letter was co-signed by 1,877 names when sent on noon of 7th November 2022. These were checked against the university logins used while completing the form and duplicates were removed, with "Anonymous" for the few cases where a signing name was not entered for otherwise verified University of Edinburgh community members, and one obvious pseudonym from a verified university member marked as such.

13. At the time of delivery, 616 comments had been received. These were compiled in a random order, after a manual check for anonymity, with a few cases of obvious personal identifiable information removed where it was not thought that the signer intended to be identifiable in that way. The comments provided a clear picture of the disastrous and wide-ranging impacts of the system roll-out, beyond what was widely known by senate members.

14. The letter remained open for co-signing and free-text comments after sending to the Principal, Senior Leadership Team and Senior Lay Member of Court. At the time of writing this paper, it has amassed 2,450 co-signatures and 74 pages of comments.

15. The Principal, Senior Leadership Team officially responded to the points raised in the letter on 18th November 2022. This response was shared with all of the signees and co-signees of the letter who had requested updates. It was also published on the University website. This response acknowledged that the People and Money implementation had resulted in a humbling and unacceptable position for the University to have placed its staff in, and that University leadership was sincerely sorry for the impacts on the mental and physical wellbeing that has ensued. The response also stated that there was a need for an external review of the change implementation process for the People and Money system.

16. A response to the letter agreed by the University Court by the Senior Lay Member, was published on 6 December 2022. This was circulated to all signees and co-signees of the letter, as requested and was also published on the university website.

17. However, as these responses minimised the significant and ongoing problems that staff were facing with the system, had major gaps in the explanation of how the

university got to this point, and was lacking in both mechanisms to solve the problems and timescales in which the problems would be solved, a further Senate response was deemed to be required.

18. This further response comprised two letters. The first requested answers to specific questions regarding the ongoing issues with the People and Money system, signed by 39 elected academic members of Senate. The second outlined the key expectations for the review into the change implementation process for People and Money, signed by 42 elected members of Senate. These were both submitted to the Principal, Senior Leadership Team and Senior Lay Member of Court on 8th December 2022.

19. A response from the Principal, on behalf of the Senior Leadership Team was received on 19th December 2022. This contained replies to the specific questions that had been posed and a note to say that work is currently being undertaken on the planning, scoping and timing of an external review.

20. Discussions have taken place between members of University Court and the University of Edinburgh Internal Audit (IA) Team regarding the requirements for the external review of PAM. During these discussions it was recommended that the IA Team also engage with Academic Elected Members of Senate. At the time of writing, a time and date for the meeting between the IA Team and the lead author of the Senate letter on the PAM review is being arranged.

Discussion

21. There is a presumption of confidence in university leadership. However, members of Senate have heard in large numbers from colleagues that this presumption has been undermined by the evident lack of preparation for and inadequate response to the People and Money crisis, especially the most recent phase, as well as shortcomings in the specific responses provided to the Senate letters.

22. None of the concerns raised through the actions outlined above have received clear answers with timelines or dates for resolution. This appears as a deliberate concealment of the facts requested, or evasion of the questions asked. Often only partial information has been provided: for example, whilst it is relevant that £150M has been paid out via the new system, the fundamental question as to how much is still to be paid for the backlog to be cleared is not answered. These are elementary questions of project management, which should be able to be answered simply, rapidly and factually. If the answer is not known, that is a scandalous failure of management; if the answer is known and is being withheld, that is a scandal of a different sort. This is not open and transparent management and does not value the valid concerns or distress of the affected university staff and students, nor the legitimate governing interests of the Academic Senate who represent staff and student colleagues.

23. The promises to work diligently and hard to resolve the issues are little more than have been continually stated throughout the People and Money implementation process. At each stage, similar mistakes reoccur. It is imperative to learn from these mistakes, to seek accountability and reparation, and to work proactively to avoid such mistakes in the future.

Resource implications

24. The ongoing responsible management and implementation of critical financial infrastructure is fundamental to all aspects of resource stewardship and expenditure across the university.

Risk Management

25. The lack of sufficient planning and oversight in the People and Money implementation was a tremendous and costly risk to the university's operations and standing. Senate

involvement in response and review will mitigate against future such risks whilst helping to address the fallout from what proved to be a reckless undertaking made without due involvement of Senate.

Responding to the Climate Emergency and Sustainable Development Goals

26. The loss of institutional and financial reputation of the university from the poor implementation of the People and Money system to date is a major hurdle to responding to the climate emergency and meeting the universities sustainable development goals, affecting the fundamental effectiveness of our academic work in this direction and reducing our potential to engage partners in this work.

Equality and Diversity

27. The harms of the PAM transition have fallen disproportionately on vulnerable members of our university community, including those on student stipends, with contingent or fractional contracts, or dependent on timely reimbursements for financial solvency. A proper reckoning and reparation of those harms is necessary to address this disparate impact.

Communication, implementation and evaluation of the impact of any action agreed

28. Senior management to communicate and consult with senate for approval of the process and outcome of a thorough review of the causes and effects of academic-related impacts of the People and Money implementation

Consultation

29. See background and context.

Further information

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Freedom of information

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APPENDICES

1. People and Money Senate Letter, 7 Nov 2022.
2. Co-signatures from the university community to the 7 Nov letter.
3. Collected comments from co-signers to the 7 Nov letter.
4. SLT response letter, 18 Nov 2022.
5. Court response letter, 6 Dec 2022.
6. Specific Questions Senate Letter, 8 Dec 2022.
7. Review Senate Letter, 8 Dec 2022.
8. SLT response letter, 19 Dec 2022.

7 November 2022

Dear Principal, Rector, and Vice-Principal of Research and Enterprise,

We are writing as Elected Senate members to express our urgent and profound concern about the unsuccessful roll-out of the new "People and Money" system (P&M) and the devastating effect it is having on all aspects of business at the University of Edinburgh. The failure of the system is causing direct hardship to students and staff and doing significant long-term damage to the university community and partners while bringing our institution into public disrepute.

Senate has a direct legal interest in the roll-out's devastating effects on our research culture and effectiveness, as well as its effects on our ability to conduct teaching, support students, and maintain a healthy environment to work and study. We are alarmed not just by the financial and scholarly impacts, but also the human costs of the problematic implementation of P&M. These date back to well before the crisis of the last few months and have adversely affected academic and professional services staff and student mental and physical wellbeing.

As members of Senate, we wish to call attention to the following (non-exhaustive) list of concerns of which we are aware:

The University is failing to meet essential contractual obligations and the basic, routine needs of research and teaching.

- **Payroll.** Staff and students have been delayed in receiving contracted wages and stipends, in some cases for weeks or longer, jeopardizing their ability to make ends meet during a cost-of-living crisis. This has disproportionately affected students and staff with greater financial vulnerability, including those on casual contracts. This has financial effects on personal budgets and credit, as well as mental and physical health effects from stress and hard trade-offs for those living payday-to-payday. Our payroll obligations are fundamental to our contractual obligations with students, employees, as well as numerous external funders such as UKRI, for whom we act as financial intermediaries to funding recipients.

- **Expenses.** Problems with expense reimbursements have included long delays and processing errors, and departments have asked that claims not be submitted at all as they are too overloaded with other P&M crisis response. Our contractual obligation to provide timely reimbursement is especially important to our most financially vulnerable staff and students, who cannot be expected to bear essential work expenses on their personal credit. Frontline finance staff have been unable to support routine expensing and procurement activities while occupied with crisis-response, and such activities that they have been able to attempt have been impaired by the new P&M system.

- **Supplies and services.** Research supplies and materials, including those necessary for safety and for human and (especially in the College of Medicine & Veterinary Medicine) animal welfare, have been delayed or unobtainable due to problems with procurement and supplier payment. Schools are unable to maintain the basic stocks of materials that are necessary to the routine function of research and teaching on campus, from office paper to IT equipment to laboratory chemicals to library materials; they have been unable to hire vehicles, ship essential research equipment, or use other necessary services. Essential teaching expenses, from computing and software services to transportation, have also been disrupted or unmet.
- **Reporting and accounting.** New grants and projects have been delayed for lack of financial infrastructure, including on time-limited projects and partnerships where such delays can severely harm research effectiveness. Inaccessibility and discontinuities between old and new software and HR/accounting systems have created serious problems for holders of existing and completed grants in required routine and summative reporting to external funders.
- **Basic financial documentation requirements.** Staff have encountered challenges obtaining current and historical documentation for essential financial and tax matters. P&M does not currently allow a member of staff to show their income, hampering staff being able to move forward in life activities such as procuring a mortgage or renting a flat. The change-over to the system means that essential information about taxable income (P60 from 2021-22 staff year) is not available to staff without specifically raising an action and waiting for a response. The inability to download previous payslips and financial statements means that those members of staff dealing with the Home Office cannot get the financial information needed to support applications. This missing information has real-life consequences for all staff at the University of Edinburgh and is sorely felt by our migrant scholar community.

The University is creating unworkable demands on frontline PS and academic staff, both short-term and chronically, harming wellbeing and careers.

- **Frontline crisis response.** Frontline professional services staff and their immediate managers have been forced to undertake massive alterations in their work patterns to attempt to mitigate the P&M problems, both as part of the official crisis response and across the board in helping departments navigate associated challenges. This has affected morale, mental health, confidence, and capacity.
- **Career disruption to precarious research staff.** Research staff on fixed term contracts experience strong pressure to produce results in order to get their next position or funding source. Multiple months of delays and disruptions from the causes noted above can be devastating to careers at what is already a very difficult and uncertain stage. These challenges also affect the career development and funding success of staff more broadly, with greater effects on earlier career staff.
- **Broader disruption to research and teaching.** Having to delay or cancel some activities and find workarounds for others is not merely a matter of exercising patience; it fundamentally alters the pattern and progress of research and teaching activity, often in ways that reduce overall effectiveness or increase overall costs. The workload demands from rearranging work affected by the P&M transition adds to stress and takes away from time available for the scholarship we are meant to be doing and supporting. Having to prioritise administrative business mitigation has compromised the availability of

significant numbers of staff to engage in the University's core business of teaching and research, with effects including organizational and timetabling problems and larger class sizes.

- **Costly administrative processes**. The new approvals routes within P&M have disrupted existing approvals mechanisms for all areas of university business, whilst amplifying and increasing steps needed for approval. Workloads have substantially increased, and there was insufficient consideration of this for staff workload and well-being, at a time when most staff are exhausted after giving their all to this institution throughout the pandemic. Academic and professional services staff are both reporting huge levels of stress, caused by this system.
- **Demands of difficult software with inadequate training and support.** The structure and terminology in People and Money are geared towards those with financial training and is exceptionally difficult for most people to use. It is not intuitive, and staff are regularly dedicating several working hours to tasks which should take a few minutes. The ability to search for products or terms within the system is inadequate and is causing huge frustration to users. There has been no reworking of workloads, and no concern for staff wellbeing, as they try to navigate this poorly designed system. Research and teaching time is suffering as a result.
- **Devastation of staff morale and ambition**. Many research-active staff are foregoing external grant applications until they are sure that the university is capable of administering financial awards, as they cannot take the risk of having to PI grants under these conditions, given the reputational and personal financial damages that they are seeing from non-payment of invoices and expenses and failure to deliver research outcomes due to the sum of disruptions.
- **Loss of experienced staff.** Professional services staff are reportedly leaving the university, in part because of the stress caused by People and Money. This adds to staffing issues and means that experienced staff are no longer available to deal with the system, as well as being highly detrimental to the individuals who feel compelled to leave.

The University has damaged our reputation and good standing in the sector and public and with essential partners.

- **Student and staff recruitment and retention.** Public failures to pay staff and students (particularly PGRs) appears to be deterring applications, especially in fields (notably in STEM) where there are competing industry pathways that imperil the academic research pipeline. By failing to deliver timely pay to research fellows, demonstrators, markers, visiting speakers and others, we make it harder to retain experienced casual staff and to recruit workers to the wide range of essential roles involved in our academic mission. We must bear in mind that our international competitiveness is predicated on our ability to offer a stable point of arrival for top students and staff from around the world, who often take on considerable personal and financial risks to relocate to Scotland and commit their talent and effort to our university.
- **Loss of favourable status or good standing from goods and services suppliers.** Due to non-payment, many suppliers have suspended or cancelled provision for the university, and it will require significant additional work to restore or replace essential relationships, likely on less favourable terms when they can be restored at all.

- **Breaking of social contracts with the local economy.** Many suppliers are SMEs local to Edinburgh, and many do not have the financial capacity to weather late and non-payment from the university as a major customer. Local relationships that support resilience and dynamism in our city and region have been damaged for years to come at a time when the university has stated increased ambitions for its civic responsibilities.
- **Breaking of contracts with partners in the global south.** The current P&M crisis has exacerbated longstanding difficulties in meeting our obligations to partners in LMICs, contrary to our commitments to international engagement and raising serious questions about ethical research practise and our commitment to decolonisation and global economic justice.
- **Loss of good-will and good reputation as a partner and client.** Our public failures of payment are making it harder (and will make it harder for some time to come) to maintain and form new external relationships with institutions, corporations, and research partners, as well as with the myriad of individuals such as expert reviewers and industry speakers who contribute to teaching, knowledge exchange, and research.

The University has lost members' trust and confidence in our leaders' capacity to prioritise essential needs and manage central change processes.

- **Lack of contingency planning.** The lack of adequate contingency plans for non-negotiable obligations such as payroll and continuity of research and teaching speaks to unacceptable ignorance or reckless disregard of what the university requires to function, and to an insufficient commitment to the university's core mission and our obligations to our most vulnerable community members.
- **A pattern of highly disruptive 'growing pains' from central change projects.** The latest crisis forms part of a pattern of exceptionally poor planning and management that includes the earlier transition of HR systems, centralised timetabling and ESC processing, travel supplier and provisioning policy changes, and aspects of the new student support model, without adequate and timely attention to transition processes, contingency planning, resourcing, and quality assurance. Staff are rightly sceptical of current and future change projects, including digital strategy and curriculum transformation, whose potential disruptive impact appears to be taken no more seriously than the highly disruptive projects we have seen recently.
- **Lack of concerns and provision for Equality, Diversity, and Inclusion**. The university has legal and moral obligations towards its diverse population, including meeting the needs of its disabled members of staff. The inability to purchase equipment or to use services which have been agreed with Occupational Health to allow disabled members of staff to fully partake in university life means that the university is not meeting its social and legal obligations in supporting diversity and inclusion, because of the failures of a poorly executed IT system. Moreover, the design of People and Money does not meet EDI principles, and the online system has many poorly designed features which do not meet accessibility requirements. This means that a diverse cohort is being deprived of the ability to contribute fully to academic activities.
- **Lack of engagement from Senior Management**. At a time leading up to further industrial action, there is a sense from across the research community that the university leadership have abandoned them at a time of crisis. Enhanced communication and

relationship building is needed to prevent ongoing escalation, which will prove devastating to the academic culture at the University of Edinburgh.

We expect a better response from University leadership:

We have seen the latest communications about planned responses and we believe they are insufficient. Existing communications do not begin to address or acknowledge either the depth of distress, hardship, and extra work this system has created, or the effect it is having on the day-to-day business of the University of Edinburgh. We believe that there is more the Senior Management Team must do to support staff at the University of Edinburgh. We suggest the following actions:

1. The University of Edinburgh's Senior Leadership Team need to clearly and unequivocally **take responsibility** for the disruption and hardship caused to date. Repeatedly asking and thanking us for our patience is cold comfort. The absence of our leaders at a time of crisis is keenly noted;
2. Credible **urgent action on short-term and long-term staffing** levels for HR and Finance, beyond the measures announced. These plans must be fully communicated;
3. A **transparent sharing and accounting of complaints** received;
4. A **credible plan** to address complaints, review what went wrong, and hold responsible third parties and university leadership accountable where appropriate;
5. A credible and fair **timeline and process for compensation** for members of the university community affected. This might include:
    i. Financial compensation, beyond merely paying the amount owed, where individuals may have suffered financially due to delayed compensation or reimbursement. This should at minimum reflect the current high market rates of interest for consumer borrowing.
    ii. Additional leave entitlement (and carryover) for frontline staff contributing to crisis response.
    iii. Career consideration for researchers, including funding contract extensions for fixed term research staff whose projects have been delayed or slowed.
    iv. Grant support for researchers on the model of the Research Adaptation Fund, prioritising early career and fixed term staff who require additional resources to account for costs and delays from the P&M situation.
    v. A one-off flat payment to all staff and student workers as additional compensation and recognition for the extra work and hardship incurred.
6. Enabling **out of cycle promotion** applications for academic and PS staff who may have missed recent promotion application deadlines due to workload caused directly or indirectly by P&M issues;
7. A credible and fair **plan for external outreach, apology, and compensation** where appropriate to affected external partners, vendors, and other third parties, with special attention to small business and minority-owned/operated partners, and Global South partnerships;
8. A clear roadmap to **evaluate whether P&M is fit for purpose**, including what further work needs to be undertaken and on what timescales, what contingencies

and accommodations are required in the meantime, and whether alternatives to P&M should be pursued. This roadmap should be communicated by Senior Leadership to staff.

9. **A pause and reconsideration of approach to other transformation initiatives** (Curriculum Transformation, Digital Transformation, etc) until this financial transformation has been completed in a functional, professional, and acceptable manner and confidence can be restored in high-stakes transformation projects.
10. Ongoing plans must be accompanied by **regular and more effective communications** from the Senior Leadership Team.

We also believe **University Court** must lead in ensuring the necessary oversight and accountability that has not been in sufficient evidence to date. The fact that the P&M transition was allowed to proceed in the state we have witnessed is evidence of shortcomings in governance that require urgent attention and correction.

We note with reference to the University's guidance on Court's responsibilities that Court is expected to see to the interests of all stakeholders in the university's strategic direction (I.2), ensure adequate evaluation and management of performance and effectiveness (I.5, III.1-4), safeguard the university's reputation and values (I.6), monitor the Principal's performance and terms of appointment (II.1), ensure the university meets its legal and employer obligations (IV.1, IV.3), and ensure ethical and responsible action by the university (IV.10).

With this in mind, we call upon Court to **oversee and take all urgent measures necessary to enable** the necessary responses to the P&M crisis from the University Executive, and furthermore to:

1. Instigate a timely and rigorous inquiry into the choice, planning, and management of the P&M system and transition.
2. Ensure that the outcomes of the accountability process for the P&M crisis inform future decision-making and oversight for major change projects and system procurement and implementation in our university;
3. Consider the P&M planning and crisis response when carrying out its role to review and act upon executive compensation and retention.

We have copied this letter to the two Senate Assessors to Court, with the expectation that they will bring these matters to Court's attention at the earliest opportunity.

We recognise the situation is fast-moving. We will be looking to see timely action from the University Senior Leadership Team and Court, and we expect to bring a paper addressing unresolved and emerging points of action to our next ordinary Senate meeting. We give permission for this letter to be circulated widely within the University of Edinburgh community.

We look forward to responses, in both word and deed.

Signed, the Elected members of Senate:

1. Dr Aidan Brown (School of Physics and Astronomy)
2. Dr Adam Budd (HCA)
3. Dr Alistair McCormick (School of Biological Sciences)
4. Dr Amer Syed (School of Engineering)
5. Dr Andrew Connor (ECA)
6. Professor Andrew Hudson (Biological Sciences)
7. Professor Antonella Sorace (School of Philosophy, Psychology and Language Sciences)
8. Dr Arianna Andreangeli (Edinburgh Law School)
9. Dr Ashley Lloyd (Business School)
10. Dr Ben Goddard (School of Mathematics)
11. Dr Benjamin Wynne (School of Physics and Astronomy)
12. Professor Carmel Moran (Centre for Cardiovascular Science)
13. Professor Caroline Heycock (School of Philosophy, Psychology and Language Sciences)
14. Dr Celine Caquineau (Deanery of Biomedical Sciences)
15. Dr Charlotte Desvages (School of Mathematics)
16. Dr Christopher Beckett (School of Engineering)
17. Constantinos Eleftheriou (CDBS)
18. Dr Crispin Jordan (Biomedical Sciences)
19. Professor Daniel Friedrich (School of Engineering)
20. Professor David Ingram (School of Engineering)
21. Dr David Laurenson (School of Engineering)
22. Professor Diana Paton (HCA)
23. Professor Edward Mitchard (GeoSciences)
24. Prof Elizabeth Bomberg (School of Social and Political Science)
25. Professor Ewa Luger (ECA)
26. Professor Gbenga Ibikunle (Business School)
27. Dr Gavin Sullivan (Edinburgh Law School)
28. Dr George Kinnear (School of Mathematics)
29. Professor Heather McQueen (School of Biological Sciences)
30. Dr Ingrid Young (Usher Institute)
31. Dr James Hopgood (School of Engineering)
32. Professor Jane Calvert (School of Social and Political Science)
33. Dr Jite Eferakorho, Moray House School of Education and Sport
34. Dr John Menzies (Centre for Discovery Brain Sciences)
35. Dr Jonathan Terry (School of Engineering)
36. Dr Julian Bradfield (School of Informatics)
37. Dr Kasia Banas (Usher Institute)
38. Professor Keith Matthews (School of Biological Sciences)
39. Professor Ken Rice (School of Physics and Astronomy)
40. Dr Kirsten Jenkins (School of Social and Political Science)
41. Dr Lawrence Dritsas (School of Social and Political Science)
42. Dr Lorna Hamilton (School of Education)
43. Dr Lyndsay Murray (CMVM, CDBS)
44. Prof Margarete Heck (Deanery of Clinical Sciences, CMVM)

45. Professor Marialuisa Aliotta (School of Physics and Astronomy)
46. Dr Mark Williams (School of Physics and Astronomy)
47. Professor Mary Brennan (Business School)
48. Professor Matt Bailey (Edinburgh Medical School)
49. Dr Matthew Novenson (School of Divinity)
50. Professor Melissa Terras (ECA)
51. Dr Meryl Kenny (School of Social and Political Science)
52. Dr Michael Barany (School of Social and Political Science)
53. Dr Murray Earle (Law School)
54. Dr Nadia Tuzi (School of Biological Sciences)
55. Dr Pablo Schyfter (School of Social and Political Science)
56. Dr Pau Navarro (MRC Human Genetics Unit)
57. Dr Paul Taylor (School of Biological Sciences)
58. Dr Peter Adkins (Literatures, Languages & Cultures)
59. Dr Pia Helbing (Business School)
60. Dr Rebecca Marsland (School of Social and Political Science)
61. Professor Richard Morris (CDBS)
62. Rob Thomas (Deanery of Biomedical Sciences)
63. Dr Sam Coombes (LLC)
64. Dr Simone Dimartino (School of Engineering)
65. Dr Simone Lamont-Black (School of Law)
66. Professor Steff Lewis (Edinburgh Medical School)
67. Dr Steven Morley (Deanery of Clinical Medicine, CMVM)
68. Dr Stuart Gilfillan (School of GeoSciences)
69. Dr Susan Farrington (CRUK Edinburgh Centre, IGC)
70. Dr Susan Morrow (Deanery of Clinical Sciences)
71. Professor Suzanne Ewing (ECA)
72. Dr Tamara Trodd (ECA)
73. Dr Tim Fawns (Edinburgh Medical School)
74. Professor Tobias Schwarz (School of Veterinary Medicine)
75. Dr Tom Booth (Department of Psychology)
76. Professor Tony Carbery (School of Mathematics)
77. Dr Uzma Tufail-Hanif (Deanery of Clinical Sciences)

Co-signatures to the 7 November 2022 Letter from Elected Academic Members of Senate to the Principal, Rector, and Vice Principal Research and Enterprise, as of the end of 2022, totalling 2,450. Signatures are added in random order to the end of the previous list at each update. All names have been checked against the university logins used while completing the form and duplicates removed, with "Anonymous" for the few cases where a signing name was not entered for otherwise verified University of Edinburgh community members, and one obvious pseudonym marked as such.

Professor Timothy C Bates
Dr William Cawthorn (Senior Lecturer, Clinical Sciences)
Ms Danielle Page (PPLS)
Dr Anastasia Yang, SPS
Alvaro Saez
Professor Carole Morrison (School of Chemistry)
Yu Shen (Informatics)
Stergios Magkriotis (SPS)
Dr Liam Ross
Dr Anja Slawisch
Dr Michelle Bastian, Edinburgh College of Art
Jarmo de Vries
Gardiner Kelley Jackson (SPS)
Dr Roza Masalmeh (IGC)
Ms Ruby Reed-Berendt
Mark Patrizio, Convenor JULC
Grace Garland (SPS)
Professor Danielle Gunn-Moore, RDSVS
Dr Ignacio Tudela-Montes (School of Engineering)
Dr Cristina Martinez Gonzalez
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Dr David Clarke (School of Chemistry)
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Dr Matthew Dale (School of Biological Sciences)
Professor Thomas Davinson, School of Physics & Astronomy

Raven Szewczyk (School of Informatics, PhD candidate)
Mrs Xiaoyan Zou (School of biological science)
Ms Ailbhe McKinney (Child Life and Health)
Professor A. Jeyaprakash Arulanandam
Noel Gourmelen
Dr Richard Sowerby
Christina Antoniou
Ms Shiau Haln Chen (Deanery of Clinical Sciences)
Mr Alex Campbell (Chemistry)
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Vicky Chondrogianni
Professor Edward Mitchard (GeoSciences)
Dr. Jose I. de las Heras (School of Biological Sciences)
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Dr Paolo Guagliardo (School of Informatics)
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Dr Attila Molnar (School of Biological Sciences)
Aldwyn Eyres
Nestor Jonguitud Borrego (School of engineering)
Dr. John L. Godlee
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Dr Annemette Kjeldsen (ICMB)
Dr Christopher Perkins (LLC)
Professor Louise Horsfall (School of Biological Sciences)
Catherine Sutherland (School of Biological Sciences)
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Dr Chris Wells-Holland
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Lori Watson
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Compilation of comments on elected Senate members' letter compiled from MS letter sign-up form up to 9 January 2023 – new submissions appended in random order to end.

Being blacklisted by specialist equipment suppliers, fear over paying rent due to threats to stipend, I have still not been paid for work undertaken in July and August!

Non-payment of a part-time PGR student with disabilities under my supervision. Inability to hire vehicles for field trips.

In over 20 years in the University, including the impact of the financial crash in 2008, of Brexit in 2016 and the Covid pandemic from 2020 and ongoing, nothing has compared to the negative consequences on staff and students of P&M. Heads should roll.

This issue is impacting student experience.

As you've covered very well in the letter. Small grant received in March that has still not been processed for use. Unable to arrange couriers to send time critical materials to collaborators. Ongoing supply issues for materials exacerbated since the most recent P&M transition with threats of key suppliers closing accounts.

As Director of Postgraduate Studies for the School of PPLS, I can attest the ongoing disruption to the lives of our PG students caused by failures in the implementation of People and Money (in particular), and irregularities and shortfalls in the implementation of other change projects such as centralized ESC and the new travel policy. The negative impact has been especially accute on Widening Participation students. As a researcher and lecturer, the pattern of irresponsible implementation and dysfunction in these recent projects has had direct adverse effects on my ability to perform effective research, and on my students' access to a smooth and technologically / administratively functional learning experience.

Lack of visibility & accuracy. Backwards steps in processing and being able to assist staff, students and outside customers

Delayed Stipend! Expense claim pending since July 2022!

Disruption caused by P&M made it impossible for us to appoint teaching support staff by the beginning of the semester for a course of 180 students, despite the fact that we requested the appointments with an exceptionally long lead time, requested by the school in anticipation of the transition. This caused substantial confusion, disruption, and stress for academics, teaching support staff, and student at the beginning of a semester which was already beset by unprecedented disruption from the cost of living crisis.

The letter says it all. I am unable to do my job supporting and facilitating research. I am spending the majority of my time dealing with frustrated suppliers and collaborators. I take pride in my delivering a high quality support for the University and feel utterly useless at the moment.

We, as post-grad editors of an academic journal of our university, have used a service from an external service provider. We haven't been able to pay our service provider on time, and even after two months, we are unable to provide them with a provisional time as to when they could be paid. This has detrimental effect on the reliability of us as editors affiliated to our university, our academic journal and our University.

I could add from my experience: a) chaos and delays in the approvals of expense claims and invoices because alerts are not always being issued by the system (and staff are having to chase these up individually); b) delays in staff recruitment because of a long backlog of issues in the system (which means research funding may be wasted); c) the mass removal of service providers from approved procurement lists which has caused delays in purchasing research services and hampered time-limited research projects from progressing; and d) a shift in responsibilities from well qualified and highly trained professional services staff to academic colleagues in PI roles, which means those with far more limited knowledge of finance systems and procurement processes are spending hours of their time trying to ensure data in the system (which is a nightmare to work with) is correct (with the threat of personal repercussions if it is not).

Several of my online students have been frozen out of their university account for 'not paying their fees' (and they have!). This is causing panic and affecting their ability to access teaching material

The failed implementation of People & Money has had a significant impact on the work and wellbeing of me and my colleagues. The problems I've experienced range from relatively 'minor' difficulties (e.g. related to logging annual leave requests) to very serious issues hampering my ability to conduct my role effectively and with risk of serious harm to financial management of the study I coordinate. The system is not functional or fit for purpose, and even when all processes are fully implemented I believe this system is poorly designed, will not allow me to efficiently or effectively carry out my responsibilities, will be a far larger burden on my time than the old system, and will not operate as well as the old system did. The following are just a few of the problems I have directly experienced. 1) It is not intuitive to log annual leave or accurately and easily review leave requests. Team members are having to valuable working hours to train new staff/other staff members on what should be a straightforward and self-directed task. 2) The system for raising purchase orders and invoicing is not transparent and it's almost impossible to track orders that have been placed. We have only one staff member in our School responsible for all ordering, putting them under significant strain and removing their ability to assist with other financial matters. Almost all orders made by our study since the implementation of P&M have gone missing – most of which are still missing now – representing significant loss of staff time spent chasing these and financial losses too. 3) The PPLS finance team is so understaffed and overwhelmed with P&M problems, they are effectively unable to assist with the financial management of our study grant. Financial matters including ordering, transaction reporting, budget transfers, and other post-award tasks have been at a standstill since early summer. 4) The P&M procurement is not functional for searching and ordering for goods required by the study. It is so hard to navigate that the team are having difficulty with ordering even simple items like stationary and (with permission of the Finance team) have resorted to purchasing goods (into thousands of pounds worth) with their personal funds. 5) Purchases made with personal bank accounts are not being reimbursed. 6) PhD students are unable to use their own computing accounts to make purchases that their studentships allow and are required to make these purchases through other staff members my.ed accounts, wasting everyone's time. 7) Of utmost concern is inability to review grants. I have had no access to transaction or forecasting reports for the grants I assist my PI with managing since early summer. Access to this type of grant reporting is essential for me to be able to conduct my role, and is particularly problematic with the fixed-term nature of the grants as we're left blind as to whether salary and other grant payments are being processed within the fixed-term period. This is causing substantial difficulties and distress to the team now and could lead to massive funding errors/failures/difficulties if the problem persists.

There needs to be more helpful staff on site to aid people. Myself and my colleagues have ended up learning as we go and training others. Emailing the generic help line does not help and is known as the black hole. It feels like the blind leading the blind. We also don't understand why there are people and money in person meetings but not one held at the WGH site where a huge amount of staff are affected.

As professional services staff with little direct interaction with P&M it has still NEGATIVELY AFFECTED EVERY SINGLE ASPECT OF MY WORK by adding complication and time to what should be simple and in many cases automatic tasks.

The impact of P&M has caused a significant delay to a series of projects (i.e. recruitment, invoicing, etc.) with industrial partners. These projects are worth in excess of £11m of direct industry funding. The relationship we have with this funder, one of the largest across UoE, has been significantly damaged as a consequence of P&M.

Holding our wages and expenses hostage in a cost of living crisis is unforgiveable. The University has over £1 billion in surplus and already underpaid staff are forgoing wages entirely. This needs to be remedied immediately.

I absolutely concur with every point made in this letter. However, it perhaps underplays one crucial factor - namely, how the design and processes implemented in People and Money have hugely reduced the ability of staff in the University's academic core (Schools and Deaneries) to control crucial aspects of their work. It

seems undeniable now that People and Money has deliberately relocated control to our Corporate support groups (Finance and HR), whose knowledge of the University's core business, and capacity to support that business is demonstrably tiny. This deliberate and determined strategic catastrophe will not be rectified by rewarding failure (i.e., adding staff to the support groups responsible).

Our research activities have been substantially hampered by the ongoing P&M debacle. Suppliers are now refusing to accept our orders and the workload on both lab members and myself has also been significantly increased for orders that can still be placed. In addition, I was awarded two substantial research grants during the summer, but we have been unable to activate either. These should have supported two staff members - and provided income to the University. Word of the P&M disaster is rapidly spreading in the research community. It is profoundly damaging to the long-term reputation of the University that its staff are now commiserated with due to their misfortune in working here.

I cannot tell if my student staff members have been paid (I have 80 - 170 Guaranteed Hours Contracted staff depending on the time of year) because there is no reporting yet on financial budget codes. I also recruit 90+ staff at a time and the P&M system is not suitable for purpose for large-scale recruitments.

The implementation of people and money has been horrendous, a prime example of don't fix something that is not broken. I fail to see the benefit of centralising the financial system as all it has done is brought pain and misery among staff academic and support alike. I would strongly recommended the people that implemented this system act swiftly to save the Universities reputation or ask the people responsible for the deal to step down as they obviously can't handle their position.

The malaria group in SBS manages a repository of malaria reagents, supported by an RA who is funded by cost recovery. The cancellation of our long-standing contract with couriers, because the UofE is not longer regarded as a reputable customer, threatens this business and the job of the RA, impedes scientific research and seriously undermines the standing of the University within our international academic community.

Severe disruption to research - we're now having to borrow consumables from other groups despite keeping 3 months worth of stock. Severe delays paying our suppliers, as well as late stipend payments.

Significant delay in the reimbursement has affected my cashflow and make it difficult for me to attend other relevant academic activities.

I use P&M on a daily basis. The level of stress this system has created has led me to retire from the University after 15 years in a role I enjoyed very much. P&M is the worst system I have used in my working life.

Constantly running into shortages preventing progression in research. Orders being left on pending approval. Unable to obtain basic lab consumables. Difficulty with identifying what can be ordered from stores in the P&M system.

The implementation of the P&M system caused a huge issue, and many issues were identified before the implementation (i.e. too low expense limit, authorisation process creating a huge burden to senior staff who wouldn't have idea of the detail of expenditure etc.). Our concerns were completely ignored, and the system was implemented. It seems we were forced to work in a way system works where it should be other way around. There was a tremendous lack of understanding of how things work from the planning/implementation team. We can't go back in time, but we should know how the decisions were made to shape the plan for transparency, considering the scale of disruption/pain caused and what it will continue to cause.

The software and the associated support and training materials clearly haven't been tested with representative users on a regular basis through the development process. I raised this issue with the head of IS and head of HR over a year ago. It's frustrating that the problems we encountered over a year ago were ignored and instead the same mistakes made on a grander scale. Much of what we are seeing was totally avoidable, were a user-centred design and development process followed. See: https://www.ed.ac.uk/information-services/user-experience/design-process

Our ability to do core business continues to be badly affected by P&M and the consequent workload and stress is making people ill. In the face of a huge and foreseen disaster the university's senior management has been unable to listen to people on the front line, and unable to grasp the scale and nature of the problems created. Staff are furious about the damage being done and the utter failure of the university's senior management.

I completely agree with the letter, and would like to highlight that not only was the response of our "leaders" insufficient, but it was also offensive. The suggestion and "advice" that students should take a loan from the University until they are paid is preposterous and outrageous. Similarly, people have been advised (through emails to the PG list) to keep payment issues concealed and communicate them only with specific people and to not send emails to other parties - indicating an attempt to sweep everything under the rug and never have any transparency about the number of people this have affected. In any other workplace, if people were not paid they would proceed with legal action and move on to other jobs. In this case it is not so easy because people cannot give up on their work so far and abandon their PhD dream. This makes this situation exploitative and students to feel like hostages.

Recruitment of student staff and recruitment of high numbers (~80 Student Ambassadors) is so time consuming our team has had to drop other priorities to complete it.

in the section relative to the damage to the reputation of our University, I would add that the implementation of P&M has caused the REPEATED loss of precious shipments to collaborators in Europe. It has become impossible to fulfil the obligation to share published reagents.

3 YEAR ONGOING BATTLE TO CHECK PAY, NI & TAX FOLLOWING INTERNAL SECONDMENT. HOURS OF CHASING - NO RESPONSE - PARTIAL RESPONSE - 'RESOLUTION' BY ONE PERSON UPDATED AND CHANGED BY THE NEXT PERSON ......NOW TOLD THAT THEY PAID MY TAX WRONG FOR 2 YEARS & TO EXPECT TAX BILL. STILL NO ASSURANCE THAT PENSION PAID CORRECTLY. .... ABSOLUTELY NO CONFIDENCE THAT ANYONE KNOWS IF I HAVE BEEN PAID CORRECTLY OR THAT ANY OF MY DEDUCTIONS ARE ACCURATE.

Many of the P&M guides are insufficient for many of the issues that researchers are dealing with. There are plenty of files that are mentioned in the guide text but are not available to view on the site. It is extremely difficult to just process a basic order, especially when requisitions are returned without the guidance on why the initial processing was wrong. As a postdoctoral researcher on an insecure (~6 month contract), I should not have to re-make and edit all the guidance that was given out to us, to make it easier for other researchers to understand.

The main negative effects of P&M for me have been: 1. a delay of more than 1 month in returning expenses claim, and 2. a delay if 4 days in salary payment. Both of these impacted my living expenses since 1. I had to be extra careful to spend less during the month of waiting the research expenses refund, and 2. the salary payment was delayed to the day of my flat rental payment, so that a further delay would have been very problematic and put me in a difficult position with my landlord.

Many of the tutors who teach on the two posgraduate programmes I coordinate have not been paid for many months, some up to five months. This is very damaging to the relationships we have spent years investing in and is eroding their good will. We are essentially expecting them at the moment to work for nothing and with no certainty as to when they may see the funds owed to them. Additionally, I should emphasise that there are significant impacts on mental health and wellbeing for staff and students affected by the many failures to pay fees, stipends and other invoices. This at a time when we are under considerable strain.

Have had to use my own money as credit for financing conference expenses as I await a refund.

The massive failure of P+M (as experienced by the huge majority of the university's staff) has already caused significant reputational damage to what *was* seen as a leading world class university, nationally and internationally. The effects of the failure are deepening and accelerating rapidly, affecting key staff competencies (through resignations or health) and key relationships with collaborating institutions (eg HEIs in the UK, Europe, USA/NSF/NASA). There are many well founded critiques of the new managerialism being imposed; the University's goals of research and teaching are not gaining from it.

PAM is completely and utterly unworkable. It is not a simple failure. There is a havoc of epic proportions. In view of the immense reputational damage to our university who and when will take responsibility for the series of mistakes that led us to the present crisis?

There is also a delay in setting up new customers for timely invoicing to comply with grants terms, potentially jeopardising project's income.

1) Affected by external suppliers not being paid since June - in particular, small community groups and businesses in disadvantaged areas of North Edinburgh after hosting events there. 2) Research Fellow working in one of my projects had delays in issuing contracts and various confusing steps (overlapping contracts being issued). 3) Also, conference expenses not paid since early September

How it is possible to spend tens of millions of pounds on P&M just to reach the current state of affairs is absolutely shocking.

Brilliant letter. Every aspect of P&M is laughably broken. Even down to simple things - having your leave calculated as "leave taken to date" rather than actual remaining leave - absolutely no thought was given to making the system user friendly. I was specifically advised by my school that procurement of stamps for a large study mailing, which were needed at short notice (within 2 weeks), would likely take months, and the advised to pay myself and claim back as that would be quicker. More than 1 month later I'm still owed £800 in expenses and have had no response when I've asked for updates. Can't imagine the stress finance staff themselves must be under - and my credit score has now suffered massively because I'm sitting with an £800 bill I should never have paid for. Just a start to the issues- the whole thing is an absolute shambles, totally not user friendly at best, and af worst it is causing stress, anxiety and fear because of the fallout. Unacceptable and I can't believe its gone on for so long.

P&M has created real difficulties in organising, and recompensing costs for, research seminars, which are the life blood of PG student and guest speaker interaction.

I do not have the capacity to go into detail how much of an abysmal structural failure People & Money is but just to say I see no redeeming qualities and it is shocking to me that this whole system was not reconsidered, considering the failures of the HR system that has been implemented over the last 2 years and how problematic that was/is (and the amounts of money that was (mis)used trying to make it work (and failing abysmally)

The rollout of P&M has been shambolic. I have so many complaints and concerns. But instead of itemizing them, I will say this: it is absurd that professors (and staff and students) at the University of Edinburgh (ostensibly a world-leading university that has existed since the 1500s) can't print stuff because we have no paper because we haven't paid our bills because of a disastrous rollout of new financial software. An absolute farce.

I would like to add to the point "Career disruption to precarious research staff." that this applies to PhD students at least as much as to research staff on fixed term contracts. In my role as student representative I have been approached by an alarming number of students who cannot conduct their experiments because of reagents and kits that arrive delayed or that they cannot order at all anymore. These students only have two options, apply for an extension that will likely be unpaid or change their experiments which will affect their thesis and potential research outputs such as posters and papers. It is important to me to stress that these students already have been through a lot of hardship with the impacts of Covid (limited building occupancy, shift work, delayed experiments), supply chain issues (that already disrupted their experiments once before), complete finance blackout for six weeks, and the ongoing cost-of-living crisis. The students are literally crying for help. Morale and mental health are severely affected and the research output of UoE students will reflect this in a way that lies far beyond the control of the students.

The letter adequately summarises the problems and the insufficient planning for contingency measures and insufficient preparatory training of staff to use the new system.

The system is just not fit for purpose. PG students not receiving stipends, not getting reimbursed for travel, not able to order essential equipment and consumables etc

I agree with the points mentioned in the letter

Suppliers are chasing lots of staff across the University due to lack of response from Finance Helpdesk, this is time consuming and frustrating for all parties across Schools who are trying their best to retain the good relationship with the supplier but have little resource to actually help (due to restricted access) . Despite highlighting on several occasions via Implementation groups and other forum the "Info for Suppliers" webpage has still not been updated with realistic information on delayed payments and how it is being dealt with .

I would draw specific attention to the reporting of this issue on social media and news outlets, which further the effect that P&M is having in putting the university into public disrepute and is likely affecting the quality of the applicants we receive on both a student and staff level, who will be reluctant to join an organisation unable to fill its basic financial obligations.

My PhD students have experienced weeks-long delays in receiving their stipends; I'm still waiting for £600 unreimbursed expenses. I am outraged this has been allowed to happen

A. P&M were repeatedly warned over several years about the obvious implications of the ignorant assumptions in the design of the system. B) My Job description, as a senior clinical academic and research professor, does not include anything about taking on the vast amount of time-wasting hugely inefficient and dangerously bad administration that I now find clogging up my email box. C) P&M is a very bad use of my very expensive time, from the University and Research Funders' perspective - who does the University think is going to deliver that research and teaching while I am wasting time on P&M? D) I have yet to discover a single benefit of P&M over the various systems that it purports to replace. Not a single one.

I have not had much engagement with PAM but the comments from those that have are very disparaging. It does appear to be a system which is not fit for our purposes.

My lab lost about £1500 from failure to generate invoices on time despite the best efforts from the admin team.

UoEs external reputation is being trashed - see article in THES this week. The Principal has been MIA since this crisis began. Is he to be held ultimately responsible?

PhD students who need to finish within a very short horizon are very stressed up by difficulties in ordering equipment and materials.

Much of my research and the postdoc in the lab depend on a fixed one year contract. There have been serious delays in our ability to perform critical experiments that would allow us to apply for an extension and/or external grant funding.

Edinburgh University has been unable to send in invoices for work we have done major grants i am leading in. I have been told that, if the invoices don't appear in the next few weeks the monies we haven't claimed for will be returned to the funder as underspend. As you can imagine this would be an unmitigated disaster for me, my team (whose salaries depend on external funding) and the University. It's hard to quantify the broader reputational damage but people with whom I collaborate have indicated a reluctance to collaborate with Edinburgh University in the future due to the stress/work at their end trying to mop up our financial mess.

Something is going very badly wrong. I am mystified why such a key system was not properly tested say on one School with lots of support before going live.

In my role as the Research Computing Officer for the Institute for Astronomy, it is my duty to ensure the researchers, which includes Postgraduate students, have the computing hardware necessary for them to do their research. The prolonged inability to order essential equipment and the growing list of suppliers no longer accessible by the university has gone from an inconvenience to a crisis. The finance teams stuck in the middle have all my sympathy, and I've avoided adding to their stress to the detriment of my user base. What is worse,

matters seem to be getting worse. Explaining and re-explaining the issues as I understand them to the user base is both time consuming and draining on my confidence.

In addition to all the legitimate concerns raised in the letter, I am also worried about the waste of time P & M entails. In the past, I ran research grants which involved literally thousands of individuals receipts. If you have to fill multiple fields for each and every one of them, you will no longer have the time to do the actual research. The responsibility for this fiasco lies with the senior management of the finance department who are also responsible for the Travel Policy that is similarly wasteful of staff time and resources. We ought to do whatever we can to ensure that there is an end to these disastrous policies.

I was awarded funding from the Wellcome Trust iTPA Translational Innovation Competition at the beginning of October. However there is no budget code for this funding yet which means I am unable to access it. The funding is intended to support my independent research as an ECR. I am certainly not the worst affected though - I have been told that other people have been unable to access budget codes since the start of the summer.

Unable to order items for research and resulting in having to pay for them myself and claim via expenses of which I am still awaiting payment.

Unacceptable disrespect for the finances of PhD students and staff during a period where personal finances are already under increased pressure. Lack of sincerity in apologies, or of any consideration for changing course to improve the situation.

I would like to also add that I have been involved in the consultations on P&M from the outset. I availed myself of every opportunity to engage and feedback on the system design and implementation. This involved a considerable amount of time I wasn't performing my core role. However, I believed that the consultations were valuable and feedback would be taken seriously. That was no, unfortunately, the case and as time went on it became clear that serious issues which had been raised were being ignored. When the finance part of P&M was released, I knew it would be difficult, but I didn't anticipate how bad it would be. Every conversation I now have is 90% P&M problems, everything I do takes at least twice as long. The duplication of effort is staggering; local finance teams are now completing forms (3 for a single payment in some cases) for central finance teams to enter onto the system. The lack of reporting available is causing major issues with financial control, grant funder reporting and invoicing. The reporting requirements of the University were known from the outset, they are the most important part of any financial system so why is it that there are no general ledger reports available to end users directly and nothing so far through the FBP route? Professional Services staff are being asked repeatedly for grant and account balances and are unable to produce these without a significant amount of work including a degree of guesswork. We have no visibility of transactions going through the system. The systems we had before were old and needed to be replaced, but I would gladly take them back now with open arms.

I am due to finish my PhD research in the next month and the timing of the installation of People and Money has led to a delay in this end point, requiring me to work past the end of my stipend funding.

Future projects delayed due to issues paying manufacturers and suppliers, relationships established over years trashed as small companies struggle with cash flow due to non payment.. Increased work stress due to spending half of my working time fighting P&M in addition to my normal work load which has led to an impact at both work and at home.

The delays in extending staff research contracts is hugely damaging for the morale of staff. Excellent experiences staff my migrate away and this will damage our ability to fulfill research contracts.   An enquiry is needed regarding why recent change management initiatives seems to ave been so poorly planned and executed.

One thing I strongly would like to add: let's say the inconvenience of P&M system is just a "bad design", P&M is still a very poor system. The response time of a single click is very long (2-5min), you literally need to wait for minutes after clicking a button. I cannot believe this is something in 2022 and they agreed to put this into use.

My main issue is that I am still unable to order from a Wellcome Trust grant and neither are my two staff members who are employed on that grant. This was raised with the Helpdesk on the 5th October and we have heard nothing since.

Frustrated at stock levels being out of sync. Due to this people are getting frustrated (understandibly so) but are taking their frustrations & anger out on the wrong people (stores staff). We can only pass along the items and information we have. Some people understand this and are frustrated at the right parties and appreciate we are doing the best we can, whereas others believe it is all our fault when we have no control over when external orders and stock arrive in. It is demoralising and is making it a bit of an unpleasant environment to be in. (This is not a reflection on all end users as most understand we are doing the best we can under the circumstances and appreciate we share their frustrations as well).

I have personally been affected by P+M, delayed reimbursement of expenses, MANY hours spent trying to navigate a poorly functioning system, The inability to order when systems were down for 6 weeks had a direct impact on my ability to do science, which is very detrimental to my career given my current short fixed term contracts. I have witnessed students in my lab not being padi on time and they still haven't received £100s of expenses after over 4 weeks waiting.

1) We've run three undergraduate field weekends to the Loch Insh facility, the first in mid-September and the most recent end of October. The facility has not been paid for ANY of these field weekends and has issued legal documents and has suggested we will not be able to use their facility in the future - this is devastating to them (they can't pay their staff) and to us (we can't use their facilty); 2) I've had three invited speakers who presented at a conference we hosted in June, who are still awaiting reimbursement for their travel - beyond embarrassing; 3) I put in orders for chemicals and when they are out of stock, the message gets sent to someone in finance, but it never gets to me, so I end up without chemicals at the right time. The list goes on...

It's good that the letter explains that problems date to well before the current crisis. This implementation ran roughshod over existing problems despite warning. I don't know how much of the problem is the system and how much is the implementation, though I think the latter as the multiple iterations of the project team, many of whom left, ignored all informed comment and advice to steam ahead. I think they started with reckless disregard and morphed to unacceptable ignorance. Re the suggestion of allowing extra leave or greater carryover - I suggest that payment for leave not taken might be better in some circumstances. This should not come from school budgets.

Scrap P&M, its clunky and unsupportive.

the letter is truly excellent - many thanks for drafting it

I needed special equipment because of a hand injury. Because of P&M this could not be bought, resulting in weeks of pain and worsening of the injury.

Impacted on ordering materials for teaching activities - pushing delivery of particular projects back to compensate for this. Orders of materials have still not been possible through P&M and new suppliers not possible to be added. Staff ordering independently with own funds to compensate for this, with worry of how long it will take to be reimbursed.

Non access to stipend remittance forms, and little support given by any members of staff except a few

Watching the impact on people within the School is sole destroying.

My EU Project GoURMET finished in July and the accounting and auditing still has not been completed, and I do not know when it will be completed, putting in danger the final payment not just for us but for all our project partners.

P&M is directly impact a number of knowledge exchange and impact projects which I help support, particularly in terms of project administration, and accessing funds to facilitate supplier payments.

Why are we continuing to 'bake in' systems that are not helpful at their core. Who led the design process? It seems to have missed the point. Systems like PAM should be almost invisible. The massive fanfare on the launch completely failed to focus on how this was going to improve things. Who is responsible for this?

£35 per student for sketching and model-making materials and the subsidy for Germany trip.

After recent years, the careers of researchers on fixed-term contracts and who have caring responsibilities have already been compromised. This will push too many beyond the point of recovery. P&M is having a devastating effect on EDI.

I want to emphasise our incapacity to ship important biological material both in the Uk and abroad. This makes us in breach of our obligations towards open research and has major implications in terms of reputation. I have had to apologise repeatedly ot several colleagues for not being able to ship bacterial strains and this may endanger collaborations in the near future.

I left my former role (Grade 8 manager post - frontline P&M user) to take a lower grade post (Grade 6) due to the severe stress experienced in dealing with the HR/recruitment part of the P&M implementation. It was either that or leave altogether, as the thought of having to deal with similar issues when the finance part went live was unbearable. The fact that nothing has been learned from that stage is woeful. Lots of alarm bells were being rung by staff who could see issues with the impending new system, but they appear to have been ignored, and now this is where we are. It really is disgraceful, and so harmful to the UoE's reputation.

I received a grant from Edinburgh Global to run a large public-facing event at the University in October. P&M made this process onerous for both academic and professional staff. Accessing the money/budget codes took a very long time, which had knock-on effects for planning and purchasing, creating undo stress all around and eventually raising the costs of some services (hotel accommodations, for example, for visiting scholars). I am now hoping that we can pay outstanding costs (external catering, for example) in any timely way.

(1) a supplier has not been paid for 3-4 months now. For my research I need to order specific material, and this supplier is usually the cheapest and reliable. I am worried now that this situation will damage my long standing relationship with them which would have adverse effects on future research. (2) it seems that anybody can claim expenses from my ERC grant without my knowledge (only line manager signs, not grant PI (3) I have no idea on grant finances as the accounts team is overstretched (so I don't want to ask them) and the information on P&M is useless. This affects planning severely, as purchases take much longer as well. (4) I had to pay for shipping out of my own pocket since it was not possible to ship material from the University due to P&M problems. These are just some examples that come to mind quickly.

protracted login issues not resolved by repeated direction to videos of actions prevented by an inability to login

I manage a team of front-line P&M users, serving School's academic and professional community. The letter is representative of our collective experience as system users and service clients.

Represented in the letter well. Since P&M introduction, my job has changed to one I would never have applied for and have absolutely no interest in doing. Despite the fact that P&M now takes most of my working day, I am still unable to obtain medicinal products for our veterinary patients in time, which leads to stress, frustration, feelings of guilt and an overall deterioration of mental and physical wellbeing of our team members and a compromised patient care in the Hospital for Small Animals, R(D)VS.

Some of the orders are not placed long after they have been approved. and it takes much longer to place the order and received the consumables.

The team responsible for P&M refuse to admit and accept the devastating scale of the problems that the roll-out of P&M has caused. There presentation of the issues as teething problems is insulting and, if the team believes what they communicate, then it is clear they are not component to have overseen the overhaul of the finance systems. In my 20+ years at the university, I have never before seen staff in tears because they cannot

do their job and are completely overwhelmed by the weight of work that is placed on them and which they cannot progress: this is what is happening now.

Not able to manage by research budgets through our school expert and hence a risk to the length of contract for my research staff as staff costs not transparent

There are multiple cases of people's pay being sent to the wrong bank account (for two months in a row now). It seems like a data protection issue, if bank details are getting mixed up between different student/staff members accounts. It makes me wonder if other staff data has been mixed up, and the missing/extra payments are the only way of us knowing that something is wrong with the staff details database.

I think there should be more emphasis on the mental health impact of this implementation. Staff are under a huge amount of pressure and stress. I know of staff who have been in tears over this and others who have required time off due to stress.

I receive a job offer for a new post within the department in LLC in June. My contract was not issued in time for the start of my new position in September, and that is despite me sending the HR and P&M reminders myself! I felt this is very unprofessional and unacceptable for any workplace, let alone such a supposedly world-class university as Edinburgh. It was never as bad as this before.

There is no replacement for the EiT system in P&M so internal payments are no longer possible. This is not exactly convenient is it?

To many to mention

Whilst not directly affected (yet) by the Finance rollout of P&M, it is distressing to see the impact on valued colleagues who need to use the system in order to do their job and feeling powerless to help them.

The transfer to the new system has substantially delayed my research. My intention was to apply for intermediate fellowships. The research delay and knock on delay in publishing means it will be difficult if not impossible to get required outputs completed in time to support fellowship applications prior to my fixed term contract elapsing. The flawed transfer to the new system has made it quite likely that I will need to leave University of Edinburgh/Academia and pursue industry based positions.

The poorly thought-out implementation of P&M has significantly hampered our group's ability to perform clinical research and also to pay for essential clinical services for the University and our partners in NHS Lothian. We have for example been unable to order and invoice radio tracer supplies from third parties to ensure delivery of the NHS oncology scanning service which we provide. Managing P&M transactions has now become a full-time job for several colleagues in our facilities, myself included. This stops us from performing our core duties and delivery of clinical research.

I have been effected by many of the circumstances in the letter and frustrated by the lack of a transparent complaints' procedure especially for suppliers.

I process payments for a large number of external/ad-hoc staff and have been largely unable to do so for months.

I am an international student and I my scholarships from home are still not being accounted for in my bill which leaves my financial situation very precarious as my scholarships disburse on a strict schedule. It is possible I will end up paying 25,000 in loans instead of most of my funds being covered by scholarship.

The system has completely changed my job description, meaning that I am spending at least a third of my day on straightforward human resources and financial matters, that we have staff employed to deal with, because permissions cannot be changed. We also have vulnerable contract researchers in conflict zones who depend on payment for their literal bread and butter now not paid, in breach of their contracts. This is really damaging to our project and the reputation of the University. I am also deeply concerned about the impact of the huge increase in workload on the research staff whose support we depend on. I would say that the future of my £18 million grant, and our capacity to deliver the work as a University is in jeopardy. I would also note, that it

was clear in July when I last raised the issue with the Principle, that most of these consequences would unfold. In fact, the consequences are much greater and more devastating on our core functions than I would have even predicted.

Stipends are being delayed, we are not getting refunded for our expenses and on top of that we cannot be sure all the reagents for the next experiments arrive. Something has to change. PGRs are seriously worried about paying rent and bills (is my stipend coming this month?). On top of that experiments cannot be done because of missing reagents. For some the only option is to quit. Please, please make sure something changes very fast!

P&M chaos has been going on for almost 2 years now, not just in the last few months. Rather than streamline and simplify tasks it has at least doubled my workload and contributed to untold amounts of stress and frustration, simply trying to do our jobs.

PhD stipends are not being payed on time, with the correct amount, equally, or at all in some cases. Request for information are meet with annoyance and dissmisal.

In a US university the responsible of this failure would have been fired months ago -- it seems to me no one is taking responsibility

The new 'system' for paying expenses to postgraduate research students has created a huge extra workload for admin staff, and lengthy delays in reimbursement. This system is separate from P&M, but was still introduced at the same time when they got rid of eExpenses.

System not fit for purpose, problems escalating as time goes on. Frustrating, time consuming, and damaging research as we cannot source the consumables that we need. Escalation of problems not working, feel very sorry for everyone having to use this system.

I am a grade 5 lab tech, and yet I have been receiving emails directly from consumable suppliers asking me to pay invoices I have no control over or even the access too. This seems to have been exacerbated by some members of the finance team requesting they contact me directly to somehow facilitate it. This was raised to me in the beginning of September, for an order place in June, and I have been chased up requesting payment into October. On Monday I received notification that finance had organised the PO for payment. This has understandably caused unnecessary stress, caught in the middle being literally unable to to anything about it. My colleagues and I are also constantly having requests rejected for not making clear the correct tax requirements - which we are not sure why we are expected to have known? We have no idea which items are or are not tax exempt. Ordering from stores complicates this further by requiring a different tax class (i'm assuming because it's an internal resource? again - we have no idea). The unexpected administrative burdens leave us feeling at times that we are doing the jobs of multiple people.

I discovered today that the Waste Office is unable to dispose of hazardous materials because its supplier has not been paid.

My research group cannot carry out their research because we cannot buy chemicals

The process of VAT-free purchase is still far inferior to the previous Sci-Quest system as VAT certificate needs to be constantly attached and each items marked as VAT-free. This should be automated as before. Also additional approval process for courier shippments is still creating confusions and there is no school/centralised tutorial for how this should be ordered. When orders were rejected/returned there were no contact information so it is usually difficult to rectify where the mistakes were.

(1) Almost destroyed the make-build-test experience for students on my UG course [course number redacted] and I am VERY concerned that we will not have sufficient material for builds in my 2nd Semester course [course name redacted] 2) Several of my PhD students have their research on hold now for months as a result of an inability to place orders and (3) Consultancy projects with companies are delayed due to the order system problems

I am quite new so I haven't "felt" the effects of P&M yet, although I understand from discussions with colleagues that they are coming my way soon. One possibly related thing is that I have not yet received computing equipment in my office (2 months into my contract), but I am not sure if P&M is (partly) responsible for this.

This disaster has paralysed most (if not all) of our research and teaching activities in pursuit of scholarship, with enormous and lasting distress to our PGR, PDRA and other staff. Who conceived, and who will take responsibility for this disaster?

All suppliers are not added to current P&M system. Also, learning an entirely new system is time consuming especially when you have lost time due to pandemic. It is not easy to take another stress impact.

This software and related changes to service delivery have increased my workload by a huge percentage over the last few years - there has never been any discussion or recognition of this, nor of how it has impacted the job I'm meant to be doing. There needs to be a review of the effects of these changes across the board.

The implementation of this system is seriously encroaching on my research time.

This is causing delays to shipping for the NERC Field Spectroscopy Facility, a national facility based at the University responsible for providing the science community with spectroscopic equipment (Field spectrometers, UAVs etc.).

The worst outcome of P&M for the University is clearly the non-payment of student stipends. However the primary effect on my role is because of the lack of visibility and reporting capability on general ledger codes (formerly D, E and G codes). A major part of my role is monitoring budgets on multi-million pound donations and endowments, and I now have no way to do this. To have to wait for a monthly report from a finance business partner is quite frankly ridiculous, and the only report I have seen since August only contained summed values not individual transactions. There are other frustrations too for the same reason: I am unable to finalise the budgets for a conference we hosted in June (the parent organisation in the Netherlands simply can't understand why I can't provide final figures) and we were unable to confirm with individuals buying tables for a fundraising event whether their payments had been received. This just looks shoddy and incompetent externally, not to mention frustrating for me and colleagues when tasks that used to take 5 minutes are now impossible.

Delays in reimbursement via People and Money are having a detrimental effect on the operation of the MAC-MIGS Centre for Doctoral Training, which I co-direct. PhD students, especially those with limited means, need rapid reimbursement for any expenses they incur. The point of P&M was to expedite payment to delay it.

Delayed orders, unable to organise shipments due to lost contracts, PhD students unable to place orders, wasted time

The letter represents the scale and scope of the issues but the impact to staff and students at an already busy time is palpable. Morale is the lowest I have ever seen in 12 years at the University. People need to be able to do their jobs.

Not paying PGR student stipends on time during a cost-of-living crisis is scandalous. Allowing student facing staff to 'face the music' when they have no way of fixing the situation is even worse. Senior central management staff responsible for the P&M crisis ignoring the concerns of the people who make this university what it is, is wrong.

I know of one case where due to P&M, the final financial auditing which forms a part of the final report for an EU grant has been delayed by over 12 weeks. The EU could now legitimately withold payment to Edinburgh (who are the coordinators of this grant) and the other beneficiaries. These other HE institutions from across Europe will never work with us again if they lose the £100Ks they are due.

I am concerned about the redeployment of frontline staff within Schools to deal witht eh backlog and ongoing P&M problems. This is creating a further backlog and detrimental effect on services at the local level as well as

affecting staff morale and mental health. Investment in true additional resource is required rather than asking exisiting staff to continue to do even more work with fewer resources.

Cannot purchase basic supplies for teaching, cannot find out how much money are in my different research grants. Cannot Buy research equipment and in danger of vastly over running research deadlines. Will the university cover over run expenses which are almost certain to occur ?

I believe it is imperative that the University recognises they could run into severe issues with Home Office with their negligence towards immigrant students on visas. Many of us have had to put into our applications that our financial maintenance is in the form of our stipend payments. Obviously, if we are not receiving that money then it is placing us in a predicament in contrary to what we state on our visas. Furthermore, they are placing undue burden of disabled international students. If we are unable to attend our lectures due to physical barriers that can only be countered by having access to take a bus or external transportation services to our lectures, we run into home office reporting issues for "failure to attend". That is, without a doubt, not the fault of the student and it is insidious on the part of the university to even potentially hold students accountable for such a thing.

I needed my employment history to provide to my new employees and was unable to access it. As I am graduating this month I am unsure if I will ever be able to access such information.

There are too many things wrong with it to name anything specific, but the fact that it has made ordering IT equipment painfully complicated, confusing and unreliable is just the tip of the iceberg!

Unable to log in my demonstrating hours and claim the money. Unable to obtain a code for putting through orders for the lab.

Agree with all in the letter. What is not clear to me is whether the P&M system was trialed on a School or Institute before full transition. Surely many of the issues would have been flagged with a 6 months initial "small" trial.

The clunkiness of the system make it very time consuming to use and a huge extra admin load has been passed on to academics

I have still not received my October stipend

I would further stress the need for funded extensions for PhD students and postdocs whose projects have ground to a halt due to inability to procure essential reagents

P+M is existentially destabilising to research organisations overseas - particularly in LMICs and LDCs - which rely on prompt payments that are now many months overdue.

A D/deaf student in our School does not have access to the captioning support she needs, allegedly because P&M is delaying the purchasing of software and the option of a live remote captioner is not available. We are failing in our legal obligations to provide accessible education to our students.

The P&M appears to be too complicated to handle. It has a significant impact on our research students, who are in their final years. It is more devastating than the covid effects.

The whole implementation and the amount of time we couldn't order things has been absolutely shocking from start to finish. Orders that we have been told were placed, have not been placed and had to be placed again. Having to order the same thing from various companies has seen us spend a lot more on our budget. No codes on our budgets anyway, so no idea what has been spent on what anyway. Companies laughing when we explain to them about our ghostly orders when we mention P&M. Companies not getting their invoices paid, so they won't supply the University. Rumoured that P&M cost £80 million pounds, if this is true, shocking. This could have been spent on giving staff somewhere closer to a cost of living payrise(haven't had a cost of living payrise in the nearly 3 decades I have worked at the University. The amount of extra time and problems P&M has had on my staff and myself has been very stressful and means us working even more overtime. Someone should be held accountable for the complete failure of P&M!!

Major concern re impact on junior colleagues.

I am a PhD student and was not paid for demonstrating in September despite following P&M process guidelines to the letter. I rely on demonstrating pay to supplement my income, especially during this cost of living crisis.

Difficult to use, espectially related to staff hiring, expense claim and manage project funding.

I submitted expense claim a month ago, hasn't been reimbursed. I need it, I am in a financial hardship now

Cannot find out if something is paid. Have been told you need to email helpdesk but don't get responses from them.

I have been working with this system for 2 years and it still isn't any better, it just gets worse. Things are constantly rejected, there is no visibility, tracking your work is nigh on impossible everything goes into a black hole. My job is much more stressful and it takes 3 times as long to do anything. I'm having to keep spreadsheets to track things and even then I'm second and third guessing myself and doubting myself. I'm good at my job but P&M makes me feel anxious and stressed all the time. I've already been off sick because the stress of working with this system caused me to become ill.

As so often in the past, the University rolls out new software before it's properly tested, and everyone - staff, students, administrators - suffers as a result. Does any University software actually work? - timetabling and room bookings are an annual disaster, Euclid is hopeless, Learn little better, the new student support system is useless, and now on top of all this you give us P&M! No wonder that academic staff are striking, and students give us some of the worst NSS scores in the country. If you wanted to destroy the University, then this would be a very effective way to do it.

I count myself as very lucky I have only had a minimal interaction with the P&M system. For around a year now I have been using the "Time and absences" service. Over that short time, I have had to contact support staff 3 times over problems with the "Absence Balance" showing an incorrect figure. At one point it claimed I had no holidays at all even at the beginning of the accounting year. Although the problems have always been fixed, it has wasted a lot of my time chasing this up and checking that the balance is now correct. The idea that this feature will be integrated with the payroll system fills me with horror.

I do not understand the decision to implement P&M in the first place. It is very expensive, and seems to make more work for everyone, including academics who are already pressed to get all their 'normal' duties done. In GeoSciences, there seems to be no oversight over claims; those administrators who have the skills to work with academics to sort out claims for research expenses have been cut from the system.

I was not reimbursed for 2 conferences and fear that the next one in November 2022 will also not reimbursed in time. The total amount is then around GBP 2,500 which corresponds to almost two monthly net salaries. Furthermore, I have not been paid for a Data Lab PhD programme placement which I undertook in June and July 2022 - I am owed additionally around GBP 1000 for that matter. Hence, the university owes me around 2.5 to 3 monthly salaries during the Q4-2022 living cost crisis. That is very bad and I will not recommend the University of Edinburgh to prospective PhD students.

I agree whole heartedly with all the contents of the letter. In addition I would like to add that ther have been no research awards processed since before the move to P&M and all the budget information currently available via the reporting available is incorrect.

Heard from staff member that they were unable to meet conditions of their research grant as a result of P&M issues which might affect future grant applications

I am fortunate in that I don't have to deal with P&M too much in my role, however the effect this has had on my colleagues, particularly in HR and Finance, has been difficult to watch. I don't feel that the knowledge and expertise of our talented HR & Finance Teams within Schools and other departments, and therefore just how much work they do, was taken into consideration when setting up this system. Simply centralising everything,

without careful consideration of hierarchies etc, has caused a detrimental ripple effect that many people are now having to pick up.

As Professional Services staff in my school, COL, are focused on P&M issues, valuable relationships with international partner universities that we provide short courses for are being left aside, as nobody is available to provide them with the business proposals (course fee and conditions) that they need. The impact of this is that we are endangering these relationships, and those partners are dissatisfied. This may lead to loss of business and reputational damage.

As well as many points mentioned in the letter, I have been threatened with legal action for an invoice not being paid.

I am owed thousands in rent reimbursement, cola payments missed, and raises. I've not received any information or transparency about these payments. I need to live off of this income, which does not allow wiggle room for mistakes like this especially mistakes so frequently made.

My stipend is not included in my payslip in the new P&M system and this is seriously hampering my ability to secure a mortgage. It used to be included before we moved to P&M in April.

P&M is an ongoing catastrophe for our laboratory. We have wasted countless hours trying to place (and re-place) orders and have no access to information regarding grants etc. P&M is slowing down our research and driving everyone up the wall. This needs to stop.

The letter summarises perfectly the many issues I and my colleagues are facing on a day to day basis.

Every system process I encounter, especially approvals of financial transactions on P&M, takes 3-4 times longer than before. Second main issue is the lack of status updates for known issues with the new system driven processes.

I fully concur with this letter. Since the start, this system has been unworkable, and was foisted upon us. The delays to student and staff payment cannot be swept under the rug and wholly blamed on a bank issue - this has happened multiple months in a row, and has caused a huge amount of stress to people in my lab. You CANNOT expect students on £14000 a year, in this economic climate, to foot the bill for conferences in the first place. Let alone in the knowledge that they are not able to get access to P&M to claim it back. A smooth and efficient service from our Stores has been replaced with an old-fashioned black box, and DIRECTLY led to the resignation of a long serving staff member. The UI to order anything is terrible, riddled with errors, and even the simplest order for a pen is sent to our Unit Director. I'm sure there's a better use of her time. We are running out of essential supplies, key reagents for experiments are untrackable, and if things do arrive we're sent the wrong item or its sent to a completely different lab. We are low on equipment that would have been unthinkable to be short of even during peak COVID. As the stores team can't implement anything themselves, any request for help has to be sent to Finance. Finance are so busy they cannot help, and this has a knock-on effect that I almost got grant money from a small charity rescinded. This would have cost me my job. We got through COVID one way or another, adding this level of stress just as we are turning back to normal is cruel.

P&M has distracted attention away from the other University own-goals, of which there are two. (1) All teaching staff have been affected by unacceptable response times and poor decision making from the centralised timetable unit. It is not fit-for-purpose and it is killing staff morale. (2) The new academic cohort lead system rolled out for first year students (and due to be applied to all other students next year) is already proving to be a backward step. For starters, the student record system (EUCLID) was not up-dated to reflect the change in student support structure (apparently it was flagged as 'not a priority'). Why UoE, why? Out of touch senior managers?

How much money has been spent on P&M in total? Where has this money come from? How much more will be spent on it - currently planned and also anticipated?

Too many problems to list. Reputational damage and loss of external suppliers will take a long time to rebuild. At heart the P&M approach with layers of approval by people with no oversight of the things they are

approving is totally pointless and the exact opposite of "working smarter, not harder". We need our systems to work for us, not us for the systems.

Time cards for tutoring were not approved in time (September's card has yet to be approved) so didn't get paid October's wages, we have to literally * chase * accommodation administration because direct debits were failing. It's hard chasing people for no fault of your own and waste time and energy when I should've focusing on my research.

Significant life decisions are severely impacted by unreliability of pay

I am on placement in the US and got a grant for this trip. Its taken 2 months to finally get my expenses back in my account with has caused me to borrow money. It has really impacted my mental health wondering when I will receive these funds to pay off debt, it total I have been owed £1000 in expenses.

The ordering of chemical for research purposes has become significant more time consuming and stressful.

All of our students in the ACRC Academy had an awful time, many newly arrived in this country, and with significant delays in getting their stipends which go through P+M

I am in my final year of PhD study, P&M system has delayed some of my key experiment as I have waited weeks after ordering important chemical reagent and cell culture media but nothing been received. It also delayed items being delivered from Store and this total chaos make me feel stressed and overwhelmed. The additional emails flooded my inbox also become a constant pain which I belive P&M now stands for Pain and Maddening.

Following the initial implementation of People and Money and the continued response, the sentiment among colleagues at the Wellcome Centre for Cell Biology is that the University of Edinburgh does not consider research as a priority. It was clear even before introduction of the system that a centralised system would not work for laboratories who order large numbers of highly specialised and sensitive reagents but we were not consulted and the system was imposed on us regardless. People and Money has already done serious damage to our reputation as a world leading research institute and without immediate intervention I fear this will be irrepairable. Even if the system were to function as it should, it would still require researchers to spend a much larger fraction of their valuable time making orders than the previous system. It really should be scrapped.

Even the name is wrong, Money and People would more accurately reflect the apparent design priorities of the system.

I started my role in October and didn't get paid on 28th October, they tried to say it was because I hadn't completed the correct task but that doesn't explain why my payslip said I was owed £0.00! I've now had an "advanced payment", I don't know if it's either the right amount but at least it's money.

They delayed my TA payment for more than 4 months. They messed my timesheets. They didn't provide me a contract in time for my appointed TA work.

I do not understand why we change to P&M. Previous system works very well. I do not understand why we have to book our flights, hotel and trains through Diversity Travel. It make us very inconvenient. The hotel and flights booked through them are much more expensive. Why do we have to spend much more money from our research grants to buy inconvenience?

This process has caused delays in stipend payment and has made aspects of my work much more cumbersome.

Even the simplest logicatal tasks, such as sending biological samples to collaborators have become impossible. Due to P&M problems, courier companies have not been paid by the UoE and have suspended their dealings with the UoE. This level of mismanagement (which would be unacceptable in any business) not only has disastrous direct effects on UoE students and staff members (detailed in the letter) but also seriously harms the uni's reputation.

Thank you for writing the letter: it is comprehensive and clear. I think priority should be given to the urgent tasks of improving P&M and paying suppliers (etc). Once this is done, then an inquiry should begin so we can learn from this debacle.

I am a phd student and am owed £400, that is rent for me and a lot of money. emailing people has taken up a lot of time too

Part of my role in the University is sending equipment out across the country and sometimes internationally. Not being able to raise purchase orders with DHL and other couriers has not only affected us but also the users of our equipment and made the University look unprofessional.

I have still not be paid for a RA job done in september because P&M keep mixing this with my other tutoring job, and the appropriate HR staff delays a lot their answer.

I am unable to complete my final report for my ERC funding, which is annoying the ERC and can damage the UofE's reputation. Please note that I am a retired professor, and the entire system is niot acessible to someone in my position, which has caused extra burdens for admin staff when I have needed to recruit staff for my project, and extra work for my staff when ordering supplies.

As a part time worker I was affected by p&m over a year ago when the system couldn't work out my leave entitlement. I understand a further £3m was spent to iron out the glitches. Good money after bad.

I am still awaiting expenses reimbursement, equivalent to >100% of my rent and household bills for a month, and experience the same issues with procurement of reagents necessary to my work as mentioned in the letter.

Multiple issues with pay and onboarding

The issue has affect reimbursement of a conference registration (which was quite significant amount) and the payment of Prolific credits necessary to conduct the research I was hired to do.

Colleagues who are frontline workers on P&M are at the end of their tethers and feel like they cannot fully properly do their roles through no fault of their own.

I fully endorse the concerns set out in the letter and hope that this appalling mess is addressed swiftly and effectively. One of my postgraduate students faces financial hardship as a result of not receiving their stipend, so I sincerely hope that a means of compensating students and precariously employed colleagues who are affected in particular is devised with all possible speed..

Core Facilities, like Edinburgh Genomics, have problems invoicing for work done as this invoicing needed to be implemented in P&M. After many weeks, we are now able to invoice external projects and non-restricted grants. However, still we cannot invoice projects to research grants. Currently Edinburgh Genomics has pending to invoice 8 research grants for a total of £67K, some of them from July. All of this internal invoicing was previously done with the eIT system.

Several projects we are working on in an international collaboration have been delayed because equipment either is not procured because deposit payment was delayed by few months or we were blacklisted by provider.

Unable to create purchase orders as yet, still to have permissions confirmed and begin training, delays in supply of materials required for workshops, running low on stock, ECA shop also suffering delays with orders and consequent lack of basic materials for students.

As Director of Postgraduate Research in GeoSciences we have suffered operational and reputational damage. Our professional services staff are overloaded in dealing with P&M cases.

I am yet to receive the stipend increase in like with inflation and I am weeks behind in receiving my expenses claim back from a recent conference attendance. This has contributed to a worsening of my financial situation during this cost of living crisis and is putting my studies and ability to remain in Scotland in jeopardy.

I keep getting emails asking if I have received orders. There is no way of replying that you have received part of the order. The workflow system that you are directed to is totally unusable. The method for chasing up orders that have not arrived is so ineffectual. I have been waiting for my salary increase (as I now work full time) for over two months.

inability to receive research grant, blood bank account closed due to delayed payments

Stationery requirements is a major issue, with exams being back on-campus in particular; and doubly so when we are trialling the hybrid on-campus / scanned exams meaning double the amount of paper required.

My role is student-facing and I am very concerned about the continued delayed stipend and expense claim payments to PGR students, some of whom are experiencing financial difficulties due to the delays. It is unacceptable anyone - nevermind some of the most (financially) vulnerable - in our community to be treated this way.

A large portion of my day previously allocated to a 50:50 split research and laboratory management is now taken up with P&M issues. To order a simple item held in our local store takes 3 times as long and although it appears to be available we often don't receive the item. P&M has ground areas of our research to a halt as 'everyday' laboratory items do not seem to be available. Often I do not even have a PO in the time that I would have previously ordered the item and received it.

Due to the excessive workload on our local accounts team and other financial staff in the university due to the implementation of P&M, we were very late submitting our CFS for the final 2-year period of a 5-year EC grant. This meant that ALL projects partners suffered a delay to receiving their final tranche of funding, as this was dependent on all partners having submitted their CFS. This obviously damages the University's reputation with the EC and among other partner institutions around Europe.

Our ordering is completely disrupted, with reagents taking far longer to arrive than normal (4-6 weeks rather than days). We cannot run grant reports. Some suppliers have not been paid for months. Some suppliers including service providers with whom we have a long term relationship have withdrawn goodwill meaning that work we need them to do can not progress. This creates a very difficult situation, particularly since some of the work is needed to meet EU project deadlines at imminent the end of the project.

It has been so badly designed that new problems arise every day. The time wasted is incredible! Research and reputation are being damaged. We need to stop pretending it's just teething problems and start a proper rescue mission.

The stress to staff in schools who would have fixed problems in minutes before, but who are now utterly powerless to do their jobs, is taking a huge emotional toll.

It may be worth pointing out explicitly that some students (although not me personally) have been forced to go into debt due to delayed stipend payments, and request assistance with paying resultant interest on debt and fixing damage to credit ratings

The whole People and Money system appears to be an unmitigated disaster with almost too many issues to detail - the software interface is extremely difficult to navigate (e.g., hitting a browser bar button generally kicks you out of your application (behaviour which should not be tolerated in modern software)) but there are numerous other issues such as in Procurement windows displaying PO numbers don't allow the whole number to be seen and crucially the final digits (most relevant for identification) of the number are obscured and application for VAT exemption requires 2 checkboxes and 1 or 2 file uploads for every item in an order otherwise the 20% VAT claim is lost (even for items held in local stores) etc., etc. These may be minor issues compared to the huge problems in payments but it is symptomatic of a system which is not fit for purpose - I really don't understand who made the decisions to change over a working system for this half baked work in

progress in a major organisation but it really brings into question the judgement of the senior management responsible for giving this the final go-ahead..

I am owed over £2000 in research expenses.

I agree with the letter. The three aspects I have heard of most myself are: delay in payment of PhD stipends (and the uplift therein to deal with cost of living crisis), stress and effect on mental health of profesional services staff, delays to research consumables and soured relationships with (local) suppliers.

My major concerns are the impact on morale, loss of experienced and highly capable staff, and the vast unbridgeable chasm between "The Centre" and "The University".

We run an internationally-renowned programme supporting PhD students and early career researchers by reimbursing costs to attend events and training. Some of them have been waiting for two months for payment of their expenses because of delays caused by a backlog in several parts of the interim processes for visitor expenses and supplier registration, as well as confusion in the routing of approvals for payment in PaM. We have also been faced with frustrated emails from our small suppliers and a reluctance from larger suppliers to enter into contracts for events because of the lack of communication on what is happening. During a cost of living and inflation crisis, it is unthinkable that a major institution such as the University of Edinburgh did not risk assess the impact that extra delays might have on its creditors, alongside the reputational risk to the University. As a result, a significant portion of my time is now spent reassuring members of our programme and trying to make alternative interim arrangements of my own. The PaM platform has many flaws, due to the user-unfriendly interface it presents. However the biggest issue is that the processes put in place for the P&M finance rollout were completely inadequate and untested. The compulsory training courses I attended as a PI did not allow me to access a testbed system so I could prepare for the rollout, documentation and tooling to convert to the new codes is patchy and hard to find, and to get anything paid, it needs to be escalated. Finally, much of the functionality is still not available, two months after the launch, so I cannot run an accurate report on my grants.

My research is being delayed by inability to order/receive oligonucleotide primers promptly (one example). What took seconds can take days. Sending and even receiving research materials from collaborators around the world by courier eg Fedex is severely compromised. At best have to apologise for ridiculous system, at worst it represents a barrier to exchange of materials.

I have been effectively stripped of my ability to see what is available let alone buy anything, and I am led to believe that none of the suppliers that I use for specialist equipment are "approved" any more. This includes equipment for research and disability adjustments. Nobody in PPLS IT was told about these changes; we have relied on word-of-mouth to piece together what is happening.

I am legally entitled to use two surnames. I am using my married name required by HR for payroll purposes (payslips, contracts), however in professional context I keep using my maiden name (teaching, research, outreach). My maiden name is my professional identity that I wish to maintain. However, the way the University systems are set up the name that is in P&M is propagated to all other systems which is making it very difficult to maintain my professional identity (display name cannot be adjusted in some systems like Learn or Zoom, and requires manual workarounds in others, like O365). There is a simple solution to this: have a preferred surname that can be setup as a display name everywhere but on payslips. Other institutions have such systems in place. Meanwhile, I have been at Edinburgh for over 2 years, and 8 IS tickets later I am still hunting down systems that are misidentifying me.

Our students not paid, a chunk of funding had been taken away/stolen by university finance, I can't get project balance information, expense system is more laborious than before, our staff is overwhelmed, etc.

The letter covers all the categories I've experienced. But to amplify, as a Deputy Director of Teaching (Operations), I've probably spent days (all told) liaising with professional services staff on how to manage payment of tutors and demonstrators. I'm also having to ask questions like "have we got enough toner to print answer booklets for exams"? I've also resorted to loaning my PhD student expenses for a conference, as it

wasn't possible to get them paid in time on expenses. And the points about other projects, particularly ESC and the introduction of the student support system, are well made.

All comments are represented in letter. I had difficulties getting my stipend paid in October and have had many difficulties and delays to research due to the new procurement system, being blacklisted by companies, and not being paid expenses. It seems like a circular situation where we are not being paid and are having to buy material ourselves leaving us out of even more money.

I am a relatively new staff member (started November 1st, 2021) and have struggled to get information from overwhelmed admin staff about how to access things/complete reports etc. At this point, I do not have access to any of my four grants or startup funds (with the exception of one where the school has underwritten me so I can pay staff). I have been paying all other research expenses out of pocket and have spent tens of hours of my time following up research & finance teams trying to get things moving.

Training was abysmal - too much finance jargon

As part of my teaching I commission input from professional specialists who contribute to the course I lead. One of these people have been severely adversely affected by the failure of the system. They work in this manner across the university contributing unique specialist knowledge and as such a substantial part of their earned income is not being paid in a timely manner that will allow them to pay their bills.

P&M has caused delays in the management of my lab. Time that I could be spending doing research, now I spend it doing admin. We haven't been able to ship samples to our collaborator without putting money from our pockets or begging for POs. We have been waiting for more than 3 weeks POs to ship samples that are sensitive to time and temperature, the experiments needed to be repeat. This cost time, money and frustration in our lab members. I have received several emails from our suppliers asking for payments, and I have to deal with them because the financial team is extremely busy dealing with all he problems from P&M. I found all this situation extremely exhausting and frustrating for my career and my future.

This has had a huge negative impact on members of my Team who are trying to negotiate P&M to order items for our researchers. No part of this system is working as it should. The loss of the internal transfer system is preventing us from recouping costs for consumables and servicing of equipment. As time progresses my staff are becoming demoralized and there mental health is being affected. There is no prospect of this system working any time soon.

Problems with expense reimbursements, delays for purchasing research supplies and materials

Communication leading up to the launch of P&M was severely lacking. Staff were given just one month notice that the system would be shut down, and for the chemical management system (which is required to know stocks and locations of all chemicals in our lab) only 7 hours notice. Furthermore the shutdown period was extended, again at extremely short notice. This came at a critical time in my research grant, severely disrupting spending plans made months previously, causing enormous stress to try and spend the money according to the new deadlines.

As a member of the technical staff whose job it is to design, construct and maintain equipment for research, the P&M rollout has impacted almost everything I do. My main day-to-day concern was the complete lack of training or resources to learn how to operate the new system. For an organisation whose primary business is meant to be the dissemination of knowledge, this seams inexcusable. After much bashing of heads on keyboards I worked out enough to order things and ended up writing my own guide which various other people are now using. The old trope of the one student in class whose notes, even though they probably have a few mistakes and omissions in them, are better than the professors and so everyone copies them would be an apt analogy. In that same vein, I doubt that those who go about reviewing courses and associated exams would be too happy if a course provided as little education as the P&M rollout did and then expected everyone to pass a defining exam based on what was learnt. The system would appear to have all sorts of potential functionality to make sure I don't inadvertently spent all of someone's grant and to make sure that if I did put in a request to do so that that person would be in a position to stop the order before it went out. The fact that

none of this works means that for an accountancy system, there is a surprising lack of accountability. As for stores, the lack of ability to just turn up and get a pencil is laughable. The whole point of stores is that low value items that are regularly used get bought in bulk and issued with minimal fuss so that end users don't waste time putting in requests and getting them authorised. The reduced holdings of stores and the lack of the promised cross-organisation integration (so if one store hasn't got something on the shelf but it is in another store it's automatically transferred) means that we now have less functionality than before. My philosophy is that "As a research establishment everyone's goal is to reduce the time from question to answer." For most researchers the perfect world would be a lab with every piece of apparatus they could imagine (and many they haven't even thought of yet) and a team of people to make whatever idea they have a reality. Perhaps even better would be to have access to the ear of God and just ask them directly to explain the whatever bit of the universe was perplexing them that day (I'm sure if we could offer that even the worlds most renowned researchers would come and work here for nothing and bring in huge grants too!) While we continue to work within the confines of what we have we need a system that reduces, not increases the time from an idea to trying it out.

There is no real replacement for internal charging (eITs) - real risk of losing time-limited funds

My full time contract was supposed to start on 3rd Oct. But thanks to the HR and the stupid system, I am now working full time but only paid half for Oct and potentially for Nov. I don't even know how long will it take to finish all the paperwork and let it go through the system. It is impossible to live with that half salary I can only say.

We cannot order computer hardware eg Apple laptops

The letter is avery good representation of the problems. Mildly speaking of the catastrophe.

I am unable to make purchase on my grant which is running out. This is making it impossible to complete work on my grant.

As a former Head of School (2016-22) I would emphasise that explicit warnings were given to senior managers by the Heads of School and DOPSs over a long period during the development of this project. There was no real evidence that we were listened to and I take no pleasure in seeing that everything, and much more and worse, of which we warned has come to pass. I have a sufficiently long memory to remember the failure of the implementation of the EUCLID project, which was much less serious than this. On that occasion heads (although not the right ones) rolled.

I have applied for work hours increase to 1.0FTE in September 2022, agreed with my line manager, and I was denied change from the same month, because this was more complicated to do through P&M. The same action took 4 days in 2021 (I filed a request for going full time on 11th November 2021 and received the amended contract on 15th November taking effect from November and I was paid full time that same month). Now I filed on 12th September to take effect the same month, and received my amended contract on 27th October, which confirmed my 1.0FTE transition only from 1st October - I was told I cannot claim for September under the new system, even though I have already worked full time in September. I received half salary for both September and October, despite working full time both months, and HR still deny my request for contract amendment from 1st September, on the grounds I was too late to file the form (due to the new P&M system, which made the process lengthier and more complicated). However, I disagree that technical issues can be allowed to determine how much one person is paid and from when their contract amendment should take effect, when the instructions by line manager differ and I have worked those hours. This issue has taken considerable time from my work hours, in the form of meetings and writing emails and explaining my point, not mentioning the stress when my contract is ending in January 2023 and my priority is to finish analysis and publish my work. I am unsure if I will be paid back for working full time in September and October. So far I am unable to find support in our HR team, I feel they are stressed by this and unable to help employees, which I think should be their priority. I have always had positive experience with HR until this situation.

I have been asked not to submit an expense claim because of the backlog of P&M issues and was expected to either absorb this cost or apply for a no cost extension to my fellowship which had already been completed.

Paycheques were 6 weeks late, contract failed to be generated, accounts closed despite changing contracts as new contract was 'not processed by p&m ops" in time.

The letter covers the problem well. Suggest that PGR Tutors should be a separate staff category above.

Not being able to order consumables and pay for other research costs for the past three months.

During the first transition my annual leave got messed up, it took weeks to sort it out, with myself and multiple other people having to spend many hours trying to sort it out. The user interface is just horrible to use as well, clearly no attention to the UX was given.

My research has been put on hold whilst I have been waiting for certain supplies to be delivered and paid for - I could not order anything for a month and when I could, I could not track my orders. The old system worked much faster and gave me access to more information regarding my order.

Procurement/Finance issues impact and hugely increase our day to day work postponing/delaying research and teaching essential services.

While I agree with the contents of the letter, I don't think it fully expresses how deeply affected staff and students have been by the catastrophic implementation of P&M, both professionally and personally. It is also important to acknowledge that the launch and implementation of the HR section of P&M earlier this year was also a disaster, despite this knowledge the university pressed ahead with the roll out of finance and procurement and, because this, I believe the damage done to the confidence of staff and students in the leadership of the university is irreparably damaged.

Issues with P&M have delayed my work due to the supply issues described in the letter. This is holding up revisions to a paper that is under review. I am an early career clinical academic with limited time for research.

I have not been paid the higher stipend promised by the EPSRC and I have not tried to claim about £1000 for a conference due to the issues. Also, it seems the website for PG students doesn't even work yet.

No lessons were learned from the imlementation of Phase 1. No testing of the system, no training on the system prior to launch and a hurried introduction to save money when the system was obviously not ready. Staff throughout the university have worked exceptionally hard and shown real commitment. Unfortunately the same cannot be said about the leadership.

People and Money has obviously made life more difficult, not more easy, for the vast majority of people in the University. While a period of growing pains was anticipated, even engineered, it was no where near appropriate and the service is clearly not fit for purpose. The substandard, slow, poorly designed, and overly complicated web interface (which breaks if the browser back button is used) is a serious nuisance and should have been enough to stop use of People and Money before roll out. Serious operational problems include, but are not limited to, nonpayment of new graduate student stipends at critical time after beginning new job, nonpayment of invoices/vendors leading to business relationship degradation (with vendors begging academics to pay invoices), lack of access to basic supplies, extremely slow or non-existent procurement, nonsensical attribution of responsibilities, redundant supervision of activities, being forced to pay unusual business expenses on personal cards. In my specific case, I am the PI of a major ERC grant, however, my line manager who as nothing to do with the grant, is given final authorisation for all purchases, effectively acting as a senior manager on the grant, privy to private grant research activities, and able to stop work by absence, neglect, or choice; this is likely highly inconsistent with ERC requirements and audits may expose this, to our financial detriment (not to mention the problems with research progress).

Please can pragmatic solutions be considered - ie allow school finance staff to raise their own POs (we are currently waiting 4-5 weeks for POs to be raised), review the approval chains and extend the use of hte Project Manager Role in the Research App to suitably qualified PS staff. I am running out of ways to apologise to people for poor service

Brilliant letter. Says it all.

As a researcher entering the last year of a fixed term contract the people and money system has significantly impaired my ability to procure reagents and perform experiments at a time of heightened stress, while turning me into a part time purchasing officer. Why University management would even conceive of such a system for researchers is beyond me, and suggests they have little regard or understanding for research workloads. As a single man I have the option of working extra hours on weekends, or into the evening, but for those with families (and young mothers in particular, including two female postdocs in my lab) they have no such option. In the ridiculously competitive research environment we inhabit, the implementation of P&M in such a manner is unforgivable without meaningful compensation. Thoughts and prayers (apologies) do not cut it.

As a purchase requester and supposed authoriser with no real authority since all approvals go up the line to my line manager, I have lost so much time that many other areas are being neglected. My personal life is suffering as I often end up 10-18HRs a day working just to keep essential services going. Much of my time is also taken listening to disgruntled students and trying to sympathise with them, especially project students with practical assignments who cannot get the parts necessary. I hope the pathetic lag in the system can be corrected otherwise this system will continue to waste millions (in lost hrs) although I am sceptical because it looks like a fundamental flaw in the way the software is written in a high-level programming language. Another area of concern is when using the system we noticed GDPR breaches, parts of users personal information is accessible in particular personal phone numbers when selecting a different requester (try doing an advanced search for requestor using any letter of the alphabet and see how many numbers you find).

There are not enough words to describe how bad P&M is. It is farce that 3 people (my line manager, his line manager and the Head of School) have to sign a form to get a pen. Four academics for ONE single pen. A single pen for 20p. And this is just the tip of the iceberg. P&M is the worst I have ever seen!

Just having less time to do my actual job (science). Surely that costs more than the savings from removing humans from the process?

I have been a tutor and worked in several RA jobs within UoE since January 2020. Even before P&M there hasn't been a single semester without payments being delayed and inaccuracies on my payslips. We have come to find ways to live by knowing that the university never pays us on time in general, since we are always getting paid a month after for any work we did. P&M only made things worse for me and my colleagues. Timecards are submitted by HR staff who have to fill everyones tasks per month while we could've do this our selves. Checking if the cards are right, which rarely they are, is absolutely counterproductive. Beyond these I am still awaiting to receive my research support funds for conferences expenses that have already occurred.

I am unable to access the people and money system and cannot log onto Oracle, therefore cannot access pay check information or lodge expenses. Having just attended a field trip in Berlin this has considerable expense from my own pocket which I cannot even start processing. Also as we approach the end of the financial year I will need to access my payroll information.

Suppliers refusing to supply due to non-payment.

Problems with P&M are not new; there were lots of issues to issue T&D contracts, especially during the pandemic when the system was first implemented for HR. Plenty of professional services raised many issues, but central Senior Management decided to go ahead with it. A shame.

Very challenging to use the system. It runs horrendously slowly at the best of times and often crashes. Few suppliers are available. Products are often poorly described making it difficult to select the right item. Not user-friendly, at all. Terminology for using the system is unclear and unnecessarily complicated - very difficult for some neurodivergent people. The fact that so much documentation needs to be written and so many different guides produced to use a system should indicate that it is overly complex and troublesome to use. The number of steps to perform basic functions, including back-and-forths between individuals (such as students and supervisors), is very time-consuming and awkward. I am aware of people quitting their jobs simply as a result of the damage this new system has caused. I have been made aware that several companies which are refusing business with the university due to lack of payment, as a direct result of P&M. I am not convinced this system was designed for humans to use - our lifespans are too short to wait for P&M to

complete even a single purchase. I actively do not want to buy things I need for my experiments because of the hassle of using P&M.

The majority of orders for lab consumables, all time-sensitive, made since September have failed to turn up. We have no possible way of knowing if the orders weren't placed, if they were ignored because the company now refuses to deal with UoE, or if they have been delivered to the wrong lab. This is thousands and thousands of pounds unaccounted for, and impossible to audit. The effect on research has been catastrophic.

Convoluted ordering process. Orders not getting processed/lost/too long to arrive/sent to wrong location or person. Punchouts failing. Orders codes not accepted/not working. Tine wasted trying to resolve issues is unacceptable.

We need to make P&M work for us, not the other way round. A big start would be removing the unnecessary layers of approvals e.g. where Line Managers who are not budget holders are invovled.

Inability to assess the financial status of my UKRI Future Leaders Grant, including planning renewal of contract of PDRA (with visa requirements), obtaining reimbursement of expenses, and more. The phase 1 FLF grant is due to be completed in 6 months (the phase 2 FLF grant is due to start on the forthcoming fiscal year).

Do they care about reimbursing visa fees for international folks? I am affected because of visa fees not being reimbursed yet. However, that's nothing in contrast with post graduate students not being paid on time. Unfortunately, every HR department in the world treats post-graduate workers as second class staff, but hey, at least pay them on time? That's the least you could do!!!!

As a PhD student, I cannot process expenses on the system and instead, they have to be process manually. Therefore I have been £350 out of pocket for over 6 weeks and gaining interest on my credit card. PhD students need the same rights as staff on the system so expenses can be paid back as quickly as they used to be.

I work on study exchanges in the international programmes team in Edinburgh Global. We have many students who go on exchanges, and come to study in Edinburgh, who receive Erasmus+ International Credit Mobility funding. Many of these students are Widening Participation. Due to the implementation of People and Money these students still have not received the funding that they desperately need. We have had many students email to tell us that they don't know how they are going to afford food next week and that they aren't able to pay their rent. This has been incredibly emotionally taxing and harmful to the psychological wellbeing of our team as well as our students' wellbeing. We have a duty of care to our students, and we are failing them. Some students have been able to receive emergency loans from the Advice Place, but the backlog of finance payments is being resolved so slowly that those students have used their emergency loan money and now feel they have nowhere else to turn. It is infuriating that we are in this position, that we feel helpless and that our students are suffering. Personally, the situation has been very emotionally draining, and upsetting, and I feel so angry on behalf of the students and genuinely worried for their wellbeing. The money is there, they just need to get paid!

Significant expenses repayment delay

We nearly lost our Bloomington account (for ordering Drosophila for research) as the invoice payment was delayed and delayed. Thankfully it was eventually paid but it could have meant a blacklisting and loss of research ability.

Several of our local contacts for a fieldtrip we run to Athens, Greece, still haven't been paid, almost two months after the trip. The delays aren't entirely P&M's fault, but I have never known this to take so long, and it is embarassing and compromises the trip for future years if it sours working relationships that have taken years to cultivate. I hope it doesn't come to this (our Greek partners are understanding and, as they wryly point out, used to bureaucratic inefficiency), but it's still disgraceful.

P&M gave me incredible amounts of stress and anxiety while recruiting new staff recently as the process was not clear at all and the system is not intuitive. It shouldn't affect my mental health to deal with the admin of hiring people!

Not only has the University's reputation suffered, but individual relationships with suppliers and contractors have been damaged or destroyed. The stress of being helpless to pay an invoice while being chased repeatedly by individuals as they grow increasingly angry or desperate due to non-payment by the University is devastating on a human level.

External examiner for a committee I was the internal examiner for had to threaten to take Edinburgh to small claims court for failing to pay them for service months after they did it.

I realise that you have drawn attention to the impact P&M has been having on animal welfare, however I would like to note that certain suppliers of research animals (such as Envigo) have already "blacklisted" the University as a result of non-payment. This narrows down the ways in which animals can be brought in for research and will impact researchers' proposals and applications for coming years.

Little thing: we can't buy stationary and are out of pencils and lined notepads. Embarrassing thing: delays in payment for field trip accommodation to a partner university.

Large amounts of expenses still not paid eight weeks after submission... :

Delays at issuing my TA contract: stress and hours lost

I am continually dismayed at the disruptions caused by P&M and appreciate this well structured letter that lays out the myraid problems associated with the poor implementation. Many thanks for this effort!

Prior to the move to P&M for ordering I would spend up to half a day in a week collating and sending orders. Since then I find I have to spend 2 days a week at least, primarily due to failed procedures, poor, inaccurate or no documentation, and a total lack of response to requests for help.

reimbursable visa costs incurred in mid-June not yet received.

I have needed documents for my daughter's financial aid application/package for university, which I was not informed I needed until 20 August. The inability to simply access my end-of-year paystub AND P60 online, as we used to do, has caused serious delays in getting this inf to the financial body that requries this paperwork. When we received notification in late summer that these would be archived and not accessible, I did not need them. I've then had to submit SR to get these, which have taken WEEKS to be filled. These delays have had serious consequences in our appeal re: our daughter's financial aid package at Yale. We are paying more than we should due to these delays for her S2 tuition. Those to whom I have explained the situation have found it extraordinary that I do not have access to simple, straight forward tax and payroll paperwork.

Letter covers it all...

More than any other aspect of this situation, the most galling is the failure of any simple admission of failure: All the communications from the centre have read as if this was some kind of accident, outside our control. No-one has had the grace to say, straight out, "we made a mistake".

No personal impact but as a student representative I have hear from many PGR students and staff of their frustrations with the People and Money system. Staff are not getting their orders through and students are not being paid/compensated, this is unacceptable.

My survey supplier (YouGov) is threatening to stop collecting time series data for an ESRC funded project unless they are paid. A disruption to accessing pay slips during the summer meant we were unable to transfer off a tracker mortgage while rates were lower. The gap in access (since we are both UoE staff) meant we had to wait to prove what we earn, by which time the rates had increased. The new rate will cost us tens of thousands over the 36 month duration of our mortgage. Admittedly this was a financial system failure

compounded by external events but were the system working this would not have occurred. My employer's actions has therefore directly contributed to make me markedly poorer.

This has affected research purchases, expense claims and personal orders. But more importantly this has negatively affected the running of the veterinary hospital. Everything from submitting patient samples for necessary diagnostic tests to ordering life saving medications. This has affected nearly every area of the campus with potentially long lasting effects as the hospital is not able to purchase from some suppliers due to delay or complete lack of payments.

I hole heartedly agree with aspects of the letter.

Have not been reimbursed for conference expenses.

If I can't get my P60, I will be fined for not putting in a tax return. My accountant is already threatening higher fees for late provision of information.

Research activities on my ERC grant have now ground to a halt. I have cancelled an international workshop because we are unable to refund visas and other expenses. I have halted work on a subcontract (this relates to P&M but also our diabolically slow legal sign off on contracts). I have a collaborator visiting from India and who has outlasted £700 on visa fees which I have now informed him we are unlikely to reimburse for months. An artist based in South Africa has been waiting for payment for artworks that she completed four months ago. This is all embarrassing and time consuming (I spend my time apologising, cancelling, responding to angry emails). It also has longer term implications. I will now be unable to complete key deliverables on my grant and this will make me ineligible for all future EU funding. It is not clear whether the University is aware of this risk and nobody has discussed this implication with me.

P&M project de-scoped work we had been telling them for years was critical to the functioning of our School, and they did so without telling anyone. Hence following Phase 2 rollout this meant additional work within College PU to quickly develop an interim solution and a significant investment from ISG and the School to develop an official solution.

I believe the letter adequately represents the challenges for frontline workers and calls to actions that are essential for our wellbeing, the communities' livelihood, and the University's reputation. I want to stress that frontline P&M workers have not received efficient training and are regularly running into roadblocks in the system, a system that is not user friendly and prevents essential tracking. I personally have experienced mental destress over the past 2 weeks as our small business/freelancers struggle with economic crisis, and I feel I can do nothing for them. As someone in your staff that suffers from PTSD, the additional pain that P&M has caused has led to added anxiety and lack of sleep for me. Other critical duties like reporting to external funding sources (i.e. AHRC, SFC, DDI) are taking longer to complete or not being completed in a timely manner due to the lack of reporting resources. The implementation of P&M has been wildly disorganized, designed in an exclusive way (i.e. only for financial professionals), and it trues feels as if frontline workers have been left to the wolves with no proper channel for timely help.

Staff having to purchase teaching materials on credit card to get round supplier payment problems. The P&M issues have also been compounded by the disastrous introduction of Diversity Travel. Colleagues running field trips have reporting young women students stranded at airports when onward coach did not turn up, late night flights booked when daytime were available, the inflated costs of staff travel not being able to book themselves. This is not value for money and is crippling activities.

Had to miss an important conference as there was no guarantee of the expense claim going through quickly, with the university warning staff not to submit expense claims due to the backlog and some colleagues waiting more than a month for a claim to be processed. Huge amount of effort required to order anything from an external supplier, and typical large delays from the university on generating PO numbers, putting orders through etc, resulting in significant delays to research milestones.

As a Facility Manager, P&M has had a significant impact on the running of the SEM Facility due to the difficulties with ordering lab supplies (especially when essential suppliers are now refusing to trade with the University) in addition to the detrimental impact of the additional workload for me

I work in the International Programmes team within Edinburgh Global. As a student facing service which provides grants to students through both the Erasmus+ Scheme and the new Turing Scheme, the shortcomings of the new P&M system has had an impact on our daily role. Distressed students have been getting in touch as they are struggling financially due to a delay in their grant payments. Some students are in high cost countries such as Australia, and may have been in country since July, only recently being able to be paid their first instalment. These students went on exchange (often knowing before applying) knowing that they would receive a grant for their time on exchange, but they have not been able to properly budget or use this grant due to the delays in receiving their payments, leading to distress and situations where they cannot focus on their studies due to their worry. Many of these students are awarded these grants as they come from a widening participation background, and the delay in the grant payment has caused significant upset, and anxiety for the students, especially when many don't have any other financial support available from family for example. Additionally, there are students who went abroad in the academic year 2021/22 who have not yet been paid their final instalment of their grant (which they normally receive upon their return). Many are struggling financially, particularly in light of the current cost of living crisis. We are having to signpost a lot more students to emergency financial support through the Advice Place, and I worry about the strain put on these other services. Equally, the increase in distressed students is having an emotional toll on myself at times, especially when relating to financial matters, and the knowledge that students are struggling to feed themselves or heat their homes because they have not yet received their grants all while they are in a new place where they don't understand other systems and support in place for them at their host institutions. Furthermore, we were told to not let students know that there has been a change in finance systems, and we were not able to warn them explicitly of potential delays in their grant payment. This may have caused further hardships for the students as they could not plan appropriately as they were not aware of potential delays. Equally, I worry that this has caused a fraught relationship between the department and the students we are trying to help as we could not prepare them for the situation, and we are not able to give them a reason for the delays in payment. It makes us look incompetent and it does not align with the culture of support that the university is trying to uphold.

P and M is massively holding back our research effort and completely demotivating PhD students and Postdocs.

PhD student's stipend delayed. Orders highly delayed (often weeks). Long time with no lab supplies. Expenses not paid. Approval process cumbersome. Interface difficult to use.

I am on a short term contract, and have spent roughly 10-20% of my hours on P&M administration since the rollout, this is time taken away from my research.

I have not received my stipend on time on two occasions (in July when we were first transferred on PM and in October). I received the stipend 2 weeks later, after contacting the finance dept and them pushing the central finance dept, but that meant that I relied on a part time job and borrowed money for that period, which was extremely stressful.

People and Money along with other University centralised control approaches surrounding travel, procurement and hiring, have rendered highest quality research and teaching impossible.

Non-payment of invoices has been extremely problematic with organisations such as the Office of National Statistics threatening to reconsider providing any data in the future after waiting months for payment. Debt collectors also threatened.

I hope the problems will be solved soon.

My experiences are in line with what is contained in the letter

Could not place orders for MSc student under my supervision and therefore has lost 2 months worth of work since Sept-22. My contracted hours with BMTO were not paid at the end of October and now delayed until the end of November leaving me to wonder how I will afford to pay bill and get food for that period of time as I do not receive a stipend.

This P&M situation is absolutely ridiculous. As a PhD student, I am already on a really low wage given the highly specialised labour that I do. I did not get paid in time this month and I am still missing the UKRI 10% stipend increase from last month. How do I know that this is not going to happen again? This is a huge amount of stress and anxiety added to an already very stressful PhD. We are already streched and with very poor mental health. I have seriously considered quitting because this financial treatment is frankly shameful and in any other industry I would be treated much more fairly. I do not know how many PGRs are going to stay in academia if these is are our conditions, and this jeopardizes the future of academia.

Thank you for the seemingly trivial mention of "paper" in the letter, for the first time "availability of paper" is part of Teaching Organisation contingency planning for Examinations, which is a huge reputational risk for the School and University.

I also work for Ed-DaSH teaching data/software skills to PG's. I have not been paid for this job at all for 7 months and the main part of this has been blamed on finance having such an amount of P&M related issues to sort. This has now added up to well over £1k of wages that have not been paid and means that now when I get paid I may have to involuntarily make national insurance contributions as I will be receiving 7 months of pay at once. This has led me to prioritise doing the same job but teaching at other universities as the pay is guaranteed.

P&M has sends me emails about staff requesting leave without telling me their name. It's also very clunky and unintuitive for shortlisting candidates (many unnecessary clicks, all info about one candidate should be accessible by one click or in one document).

There is an associated issue related to the responsibilities of Head of Group in approving expenses records. Another less associated issue is the compulsory use of Diversity Travel and the fact that its rates are more expensive than market.

The administrative load imposed by P&M is ridiculous. As a senior PI, I now need to wait for one week to get my Head of Institue to approve orders that I make from my own grants. This is causing significant disruption to our research.

delayed supplies; staff unprepared; training provided absolutely inadequate; unpaid students; time to pass and process requisition decuplicated

1. My postdoc has skipped at least one major conference because he can't afford to not be reimbursed. 2. P&M does not allow professional surnames, so I still don't know the real last names of some of my newer colleagues. 3. One of our 1st-year PhD students on a national prize fellowship has been threatened with legal action _personally_ over an unpaid bill for a training course invoiced to the University.

I have been waiting for equipment which my Occupational Health report states I need to work, the order was placed back in June and it seems like it will not arrive until after Christmas at the latest

It is not clear to me why the lead staff members have not resigned in shame at the mess they have caused. Perhaps a clearer statement about the inadvisability of attempting to institute administrative changes that affect a University of the size and complexity of Edinburgh, where inevitably some areas are out of kilter with others and find their needs are ignored. Think Diversity Travel, think staff who engage seriously with the Global South.

Staff are spending huge amounts of time discussing P&M and the issues it is causing rather than discussing research.   It is eroding everything we value.

The lack of sufficient training and guidance on how to use P&M means everything takes longer.

I spend hours doing something that used to take a few minutes. I get an extreme amount of emails cluttering my inbox with no clear idea of what ones I need to take action for. I am a smart person - the P&M system is still impossibly difficult to navigate and figure out as there are no clear instructions available.

As stated in this letter, there should be a full and transparent inquiry. Having known about the implementation of P&M for a long-time I was dismayed that there was little communication by senior management. Training, when it did become available, was wholefully inadequate.

As someone said when talking about procuring lab supplies: "That used to be easy, but of course, it's much more difficult now with the new system"

My stipend payment for September should have been paid at the end of August, but I didn't receive it until 21st October. I also submitted an expense claim of £878 on 17th September that hasn't been paid yet.

I have had delays in stipend payments that have left me in serious financial hardship.

Professionally, I have had a project, and a relationship with a commercial partner, negatively affected by procurement delays. Personally, lack of access to historical payslips is worrying for upcoming (very expensive) mortgage renewal.

Thanks for putting this letter together.

I have encountered several issue to date, including: inability to record staff absence interviews, expenses claims and missing out on events due to inflexibility of payment methods. Support has also been far from adequate and training sessions very poor, a complaint I have heard from most of my colleagues.

The letter describes the impact comprehensively but falls short of a demand to entirely dismantle P&M. Even the name misrepresents the enlightened objectives of our University.

I feel many staff involved within the project have likely worked themselves sick to try their best to get a system working but based on the decisions of higher up members of the institution who don't fully understand the impact on the decisions of the staff down the line. Sufficient training has not been provided to staff who need to use the system and to those who support the system. I know staff who are working hard on trying to ensure the system works and the issues faced are mitigated but my feeling is that these staff may not feel their contribution and effort is not valued or seen.

P&M has been incredibly stressful, it's difficult working to close deadlines in any large institution, but there's a level of helplessness added by P&M. You go through all the documentation but you may still have weeks added to recruitment or purchasing processes because there is no certain way to make sure your submission is not rejected.

All issues I'm experiencing in the letter.

My partner went unpaid for 2 months while Interning for the University

I am a first year post graduate researcher. Currently I have been sent abroad for experiments twice that have had to come out of my own pocket to claim back on expenses. I currently have no access to P&M at all so cannot try and claim any of it back leaving me out of pocket with bills and rent to pay. To further add to these problems I started teaching to try and earn some extra to help pay for bills during the cost-of-living crisis but have not received my teaching contract yet, even after teaching for 2 months further adding to my worries. I was sent an email to login to the P&M system and set up a password but even after setting it up it claimed my account did not exist. I'm currently owed just under £1000 for both pay and expenses. I know that the finance team has been under a lot of pressure recently so have not wanted to add to it and was waiting until things were sorted but my stipend can only be stretched so far.

The letter is comprehensive and covers my concerns.

Thank your for writing this, you have clearly articulated all of the issues. I am of the view that the damage done to the credibility of the leadership in the university is irreparable, and that the only viable route to regain confidence of many staff and students is to force a change of leadership. #BringBackSirTim

The letter does list most of the problems and wider concerns arising from P&M. The lack of compassion and care from the senior management was already visible during the pandemic (e.g. student halls) but this takes it to another level. We need accountability. As for specifics not covered by the letter, the rapidly changing nature of P&M and its many patches has led to a complete destruction of the financing system to the point that even recently written documentation is out of date and no one knows who can order or approve requisitions.

They ways I have been affected are covered in the letter - outstanding expenses payments of a few hundred pounds, delays paying collaborative partners.

P&M issues are also affecting our landscaping team and their ability to work with local vendors, contractors etc. I will send on to them and ask them to be in touch.

I am very concerned that due to the poor handling of the system handover, important contracts with outside suppliers such as vehicle hire will be lost and this will as a result seriously compromise our ability to conduct effective fieldwork in this country..

I have been told that P&M will pay 'around' the 28th instead of on the 28th or previous work day as before which isn't good enough for budgeting when my rent and bills come out on the 1st of the month. I had to chase up my pay this month and am worried how many times i might have to do that.

The chaos it created prevent me to reimburse money normally, which is not a small amount of money.

Stipend payment delayed, ordering essential lab reagents/consumables/animals massively delayed, expenses not been paid 2 months after submitting

Besides economic hardships to students and staff, mostly I am concerned about the reputational damage this has caused the University with suppliers threatening to sue us and others leaving us. I am horrified at the amount of work and responsibility this now puts on Line Managers, and now our School is unable to order paper for our printers because the supplier has left us. It's embarrassing and shameful, not to mention burdensome with so many codes and accounts to get entered incorrectly, accounting errors are going to be riddling us soon.

I manage a core facility within the Centre for Regenerative Medicine. Facilities across the university have been unable to process income transactions since the end of June 2022. Therefore, we don't have an accurate picture of the facilities finances for example, we don't know if there is money in the budget for essential equipment repairs/replacement. Also, many of these facilities including mine operate on a cost recovery basis, technical support staff salaries are reliant on income generated. As a facility manager to not know my facilities financial situation going into the 2nd quarter of the financial year is very worrying, particularly because 2 members of my staff's livelihood depends on income generated.

I lost out on wages because of an issue that caused me to be paid from the wrong contract. This resulted in me having low payments in Nov and Dec.

The disruption and delay of almost all essential services should be grounds for a class action lawsuit for gross breach of contract and misuse of public funds by the University Administration. Accounting should be made of estimated lost time and wages.

Whilst I have naturally been impacted and delayed (and stressed) by the failures of P&M stated in this letter, personally I am appalled that such a burden has been placed upon the financial and administrative teams and how this crisis has strained their workloads.

Unable to order reagents, stipend paid late, expenses not paid for 2 months, feeling demotivated

Having worked for the University for over 15 years, P&M is the last straw. We have suffered the inefficient implementation of several centralised systems, and the only consistent thing about them, is that they are never fit for purpose. Any concerns through consultation, if there has been consultation, is more than often ignored. Year after year we raise all the same issues only to be told that there is no resource to update these systems. The impact of increased workloads on frontline staff whom I work with and manage, cannot be understated. It is more often than not these key members of staff who have to actually implement these new systems, with no extra resource provided. The number of talented staff who have left our school over the last few years, due to workloads affecting their mental health and wellbeing is startling. From a personal perspective, I have always worked hard and more hours than contracted, but as of now there is no good will left.

Very coherently covered! Thank you for writing it

In the seven years I have been a member of this prestigious university, the infrastructure in place to support our teaching and our research has become continuously worse. Now my time here is coming to an end, I can truly say that I believe my fantastic colleagues have performed so well in spite of the University's blatant money grabbing infrastructure and support systems and not because of them.

Contract Services have a high purchase order / requisition turnover and we are dealing with many issues regarding the clunkiness of the system, we still don;t have sight of our budgets and no mechanism to recharge work for clients yet.The worst part is the mess of unpaid invoices that seem to be left to us to sort out, its very stressful.

ESSENTIAL COMPUTING EQUIPMENT NOT DELIVERED AND MISSING DUE BECAUSE OUR LOCAL STORES HAS BEEN TAKEN OUT OF THE PURCHASING PROCESS.

The letter is spot on, very well worded, and much overdue.

I'm a double Edinburgh graduate, and have worked for the Uni for over 20 years, I am loyal to the UoE and criticise in order that it improves

The letter represents the severity and scope impact of P&M on my ability to do my job of Facility Manager at the university. This mess with financial services will cost clients and income if not resolved immediately. Our jobs are already difficult enough, without this self-inflicted chaos. Sort it out and let us get on with our actual jobs!

Very comprehensive document; many thanks. It is still unclear why this centralisation was undertaken when the previous system worked well.

It took 7 weeks to process my large expenses claim post-fieldwork. This is in addition to the ~6 weeks that I was unable to make a claim due to P&M transition.

One of my research projects has been seriously delayed by the University's PAM-induced inability to pay an access fee for a dataset.

I want to reiterate that delays and breakdowns in the University's administrative system are having significant detrimental effects on our relationship with external research facilities and suppliers who aren't being paid, and with whom our Finance and Accounts departments are too busy to communicate.

We (PhD students) have not received our cost of living pay rise for months due to P&M issues. As a PhD student I need access to stores in physics but because of P&M I can no longer access this in anyway and the process for Post-Docs and above is over complicated, requiring 3-4 senior members of staff to approve requests for cotton buds (I've heard of a director having to approve 1p requests for chalk). Booking flights and getting reimbursed is so overly complicated that already tight for money PhD students are struggling to go to experiments and conferences. Teaching assistant money is also being delayed in being given out to PhD students.

Thank you for this carefully worded document and many efforts in this, and other, crises. Another issue that the P&M crises causes is the masking of other issues, including issues with the additional risk to staff caused by using Diversity Travel and the Sustainable Travel Policy.

This has impacted our ability to get resources and for other members of the team to be reimbursed in time. My contract renewal has also been impacted by these delays and becasue of the massive backlog, I am unable to change my hours as originally agreed.

The current situation seems to have arisen from a sustained failure to listen to real user input and progress despite significant anticipated concerns

I have been told today that a supplier has not been paid for parts and servicing of an instrument because I had not receipted the goods. and work. In 25+ years of working at UoE this is not an action which I have had to do before. I had asked multiple times whether the invoice had been paid, as it needed to be done before the end of the grant period. The video instructions I was finally forwarded were extremely obscure and didn't work for me past step 1. When in despair I went to our Chemistry Stores, it turned out that one of the staff with different authority level was able to perform the operation in 5 mins. They used to do this automatically, without involving academics unless a check was needed. Why has the receipting of services been changed so negatively?

Supplier chasing us for invoice remaining unpaid for months. Financial Helpline too busy to respond.

P&M coming so soon after covid was particularly risky. For example I have PhD students who couldn't do fieldwork because of Covid and now can't go because they can't pay overseas partners. This can ruin a PhD and associates career development

I moved to Edinburgh from Loughborough as an SL in October and after a month am still unable to see my budgets, procure anything and thereby appropriately support my externally funded PGR student and EPSRC funded PDRA. This is pretty shambolic and no small source of surprise and amusement for my previous colleagues. I expected a much more professional environment to move into.

I am a second year PhD student, but the issues I faced were linked to my staff P&M, since I am a demonstrator as well. Most of my problems were linked with the inability to access my staff P&M. I was unable to access my staff P&M even weeks after it was set up. I kept getting task notifications, but could not do anything about it since I was yet to receive the login details to my P&M. I could get access after a couple of weeks, thanks to all the help from the HR helpline. But, I am currently locked out of my P&M because of 'missing information', and this has prevented me from submitting my time sheets, which means I can't get paid.

You have summarised the extent of the present crisis very well. Even starting now, the negative impacts will take years of very hard work to make good- I doubt if senior figures in the University realise just how much damage this has caused to our operations and crucial external relationships. The people directly responsible for this fiasco should be held accountable, and the institution must learn lessons from this about how to implement change.

Everything takes longer. Expenses and payments are too slow. Ordering is not straightforward. Some local businesses do not want to engage with us.

It is very hard to use - not at all intuitive. I just want to submit a pay claim from an external examiner and have to read a 20 page instruction manual and I still don't understand what to do.

I think this point is covered in the 'extra work for academics' but to elaborate - having the HOI approve all purchases - from grants on which he or she has no involvement is completely ridiculous, and meaningless. The HOI (me) just sits and clicks approve with no idea what these items are (nor should I have. These are not my grants) It is just a mindless, time consuming excercise. Similarly within my own lab, I would be happy to give certain people blanket approval for, say, purchases up to £500. But that is not possible. I have to approve each item, which could be as little as £1. Having to do all these approvals - because members of my lab and my

institute would suffer if I did not, is preventing me from performing the research, teaching and leadership I should be doing.

I do need to use P&M s part of my role, but not on daily basis. However my interactions and collaborations with colleagues who are frontline users have been fractured by the failures of the roll out. Dealing with the failures have become a priority for many, including my line manager, which has an obvious, albeit indirect impact on the projects I'm responsible for that need me to negotiate colleagues involvement and input, and cause a lot of stress caused by the backlog of issues that I'm witnessing piling up while I'm waiting for colleagues to deal with the worst of the P&M failures. The stress is also caused by having to occasionally use a system I'm not familiar with, which is not intuitive and full of financial jargon that I am not used to is also a major source of stress. The direct impact on my workload is also apparent, as tasks that used to be carried out by colleagues in finance departments have now been added to my workload, without relieving the load elsewhere.

It's taking hours to try to figure out how to order items both externally and internally from stores for supplies for my lab. I'm struggling to get essential items for the lab, such as nitrile gloves (a H&S aspect of the lab), as the orders I put in either don't arrive at stores or, the prices of the items are wrong in P&M and it won't allow me to order them. I have no idea who to contact to get the prices changed in P&M. Having to get approval to buy small inexpensive items is also slowing down the ordering process massively (if I want to order a £20 box of gloves, from our stores, for the lab it needs to get approved by my line manager and the head of the Institute, why? Some people needs the approval of 3 - 4 people up the chain for similar items - there is no need for that and it just adds more work for everyone). At this point I've stopped trying to order anything because of how difficult it has been to place them. I used to be able to see the finances of the SRF facility I am part of, through WebFirst, but now I can't. I have no idea how much money is in the account and if money is going into or out of the account. The SRF is supposed to charge research grants for the upkeep of the facility but I have no idea if any money has been invoiced for the facility for months now. I don't feel I can make any purchases for the facility if I don't know the state of the finances. I feel this is affecting and compromising the quality of the research that is going on in the lab.

System is awful, but implantation of it by SEP was even worse. How much money has been spent on this completely incompetent group?

Recently recruited into a lectureship I experienced the badly broken HR onboarding of P&M. Multiple repeats of many broken tasks in an almost unusuable interface, accompanied by tens of reminder emails. I was already staff here, but I would be utterly embarrassed to make that the first experience of a new member of the University. I sat through the long video briefing on ordering. Really incredible, like some Kafkaesque satire. That such simple tasks should require training is already a failure, but it goes beyond this by some orders of magnitude. As a new PI I am currently very reluctant to engage in any recruitment where this is what a student or new member of staff is brought into.

This haphazard implementation of P&M has created a mountain of administrative problems for our externally funded research programme, placed undue burdens on all staff and made reimbursements, hiring, and payments near impossible. We are only managing because the Law School staff are working exceedingly hard to make sure that the most urgent processes are cared for. This has affected our ability to do our work, but has had the greatest impact on our newest and most junior staff members, some of whom have faced delays in payment. University of Edinburgh finances ought not require triage principles to function!

The letter rightly focussed on people and money and the urgency. However I believe there is a much broader concern regarding 'top down' corporate model of governance. Are are a cooperative of small centres/departments who have different needs and requirements that is best governed locally. This gives the flexibility and control needed to run effectively. To down models of centralised policy and one sized fits all approaches do not work. This is part of the current issues and are affecting morale at all levels.

After a lengthy process applying for an extension to my Leverhulme Fellowship, People and Money means I cannot now undertake my research. The university owes me more than £600 and I can't afford to do any more research trips or purchase any materials (eg books) until I am reimbursed.

I have had delays being payed back expenses, more than 3 months now. Instead of the previous efficient online system I now have to send off a manual form to admin for them to submit on my behalf. I have been down >£300 for 3 months, completely disgusting as PhD students get paid the equivalent of minimum wage. I also now can no longer order chemicals from stores (internal) or to companies (external) as chemicals companies (such as Sigma) have blacklisted the University for not paying their bills.

The letter details my problems comprehensively

As outlined in the letter, I am a PhD student who was not paid my stipend in September. This took over 20 days to resolve and included multiple mixed messages from central finance regarding payment dates that ultimately did not happen. This resulted in an escalation to College after all other routes were exhausted, which was then not picked up for multiple days. I am a part-time PhD student, so I already do not earn a lot, and it should not take weeks to resolve an issue like this. I also cannot access P and M despite being a matriculated PhD student on Euclid. We have submitted a form to central finance about getting me re-registered, however they claim everyone has access now (which is not true in my case). Still waiting to get this issue resolved.

There has been serious and unacceptable delays in payments to companies working with the School of Engineering. This has delayed orders, deliveries, work flows and in one circumstance, seriously financially effected a small independent service provider. Additionally, major delays in invoice payments and payments for expenses has put significant financial burdens on many staff or forced staff to abandon attendance of conferences and events. At a time when other Universities are providing additional payments and financial support due to rising cost of energy etc (such as University of Strathclyde amongst others), Edinburgh University has made a seriously flawed decision that is effecting our work, company relationships and the reputation of the University. This is a serious issue that needs to be resolved asap, hopefully, by reinstating the previously working system.

Even if all the problems were ironed out, P&M still results in admin overload, places additional unwarranted work and responsibility on folk distal to where decisions need to be made and takes away autonomy from the laobatory managers who need that to do their day-to-day work. Requisitions for small sums are being 'escalated' to line managers who simply should not be dealing with that sort of styuff, as lab managers should be accorded a maximum amount per transaction that would simply require 'self-approval' (they know what they need, absolutely). P&M should NOT be sending emails to us over the weekend!

Covered in the letter, but many PhD students faced delays of 3+ weeks for initial stipend payments with no warning this was to happen due to P&M

Clarity regarding the call for Prof Services out of cycle promotions - there is no promotion, only a potential regrading of posts which would be impossible currently as the business need would be difficult to quantify when the final support structure for finance remains unclear. PS staff working on the frontline (which I am not) need bonuses. Most are at the top of their scales so increments won't help. We are going to lose many talented and experienced PS staff, without whom we will have no understanding of what is actually happening as knowledge of previous financial systems is essential to understand how to rectify issues in the new one

I have needed to raise multiple support tickets for every type of way I might want to use P&M ; the user guides and training have been ineffective. I am also spending a lot of time either training or assuring other staff that their experiences are not personal to them.

I have been unable to raise a purchase order in time to pay for a ticket to an important computer security conference. I've also witnessed first hand the problems of TAs not having roles confirmed in good time for the start of teaching. It appears that teaching this year is mostly being achieved by the goodwill of people who hope they will one day be paid for their efforts.

Holidays are incorrect every year, and seem to change for no reason? Some companys will not take orders/send engineers due to overdue bills

I haven't been reimbursed for expenses and don't want to incur any other expenses in case it takes months to refund me.

My October stipend was paid less than what it's supposed to be. I was owed £1582.43 but I was paid £1490.60.

I started in the post of Receptionist in the summer, since then my line manager, the Administrator has left because of frustration and stress with People and Money. An admin assistant has started and left in this short time also. We have just got a new admin assistant and are still waiting on the senior administartor post to be filled. Due to this we don't have anyone to process any Finance and I am fielding invoice requests etc. I am putting things through petty cash because I've been told are usual suppliers for basics like office stationary and catering supplies won't work with us anymore. I spend my lunch hour going round local shops to top up Tea, coffee biscuit supplies for the Chaplaincy Centre. I'm unsure how to procure larger more expensive items.

my hotel group booking for a workshop is still unapid since 27 September without mentioning speakers' travel expenses and the grant ended on 31 Oct!

I have been trying to get reimburses claimed in P&M but haven't been able to submit the application so far. This is because the funds come from a cost centre not available in my P&M profile, and I have been chasing Finance, HR and P&M for a month to get them to include this cost centre. None of them have the answer and keep passing the responsibility to each other. In the meantime, I am £800 out from my own pocket and no clue as to when I will be able to submit my expense request, let alone be reimbursed.

P&M prevented me from being paid my stipend. I was only eventually paid once local academic and finance staff stepped in to issue emergency payments to individual students. This place enormous amount of stress on me personally and resulted in a whole day's loss of productivity. It was also inefficient and stressful for staff who had to drop everything to work to sort out this P&M problem. I have no faith that I will be paid on time next month and so have the stress of that looming over me now too.

Submitting expenses

I'm managing the flow cytometry core facility. In a core facility we depend on the researchers bringing us work. Depending on the financing model, the Core Facilities depend on the income generated by the research. If the researchers cannot order what they need to run their experiments, there is no income for the Core Service Facilities.

I am concerned about the purpose and direction that the top management has led the University towards by implementing P&M system.

Many aspects of our research have ground to a halt, because of difficulties in every phase of ordering and delivery. We went through the very painful process of ordering a standard laptop computer (with all the specifications already chosen in the "punchout" (whatever this specialist term might mean), but after dozens of emails (including a request from the company for a quotation, despite the fact that specifications and price was all detailed within our finance system), the laptop had not appeared after two months! We went from Stores to Stores, until we found the laptop that had finally been delivered a few days before, but the system failed to include the end user, with only the person in procurement had been specified. The inabilty to have essential samples shipped by couriers, evidently because they haven't been paid, has truly damaged our ability to do our research and has damaged trust from our collaborators worldwide. For example, we are now paying interest on the money owed to a Danish shipping company, in deal worked out by the SBS Finance team (to avoid me being a personal target of litigation), and this money is supposed to be paid out of our grant income (which the funders may or many not allow upon audit). I am personally driving samples on dry ice to Cambridge and Oxford, which is a Health and Safety risk, because we can no longer wait for our usual couriers. A visiting Fellow (whose salary was entirely paid by another country) was unable to complete her work with us due to the unexpected introduction of this disasterous Finance and Procurement system; we simply could not

get the reagents required in order to finish the work before she had to go back. There are many other stories to tell, but the overall message is that there is very little that seems to be right about the new finance and procurement system, the impact of which has been enormous, devastating and long-term.

I didn't dare to file my personal expenses, because I wouldn't know how it works and I doubt the capability of the system as it stands now.

Items ordered through procurement take over one month to receive a PO number - despite these items being available within the same week if I were to order myself and claim expenses.

I have read through over 700 responses to the UCU P&M Impact survey and it was a harrowing experience. I am disgusted by the impact that the implementation of P&M has had on the university and wider community. No-one seems to be accountable. When no-one in an organisation takes responsibility, then it is leadership's fault. Therefore Principal Mathieson should resign before he causes any more damage to the university's reputation.

The letter covers the majority of concerns but personally the lack of expense reimbursments, the stress on professional services staff and the delay in paying for services, lack of support for ECR and PhD stipends/salaries and project partners in the global south are most concerning. Fundamentally the lack of transparency on the scale of the issue and the consequences has been staggering. The additional pressure this has put on staff, our partners and suppliers is unacceptable.

I was been unable to purchase equipment for fieldwork through the usual channels so had to buy on my credit card instead. Delays in getting reimbursement for these expenses meant I have missed payment on my credit card, incurring charge and lowering my credit rating.

Completely unuseable for ordering most research consumables

Unpaid additional time managing tutors with pay issues

Procurement of lab consumables is made very difficult. Non-payment to suppliers shut us down altogether.

I am not sure if it was mentioned but the amount of time spend to order various items has more than double. I am a floor manager and a lab manager so I am responsible to order communal research stock. It used to take me no more than 20min to order the weekly stock and my own lab consumables. Now with the new system it can take me more than 1h. This time issue impact on my work and I have to do longer day to compensate.

Staff will need more than a nebulous digital strategy presentation to restore faith in this process and other disturbingly similar rollouts.

Had to take money out of mortgage to meet agreed payment to collaborators in LMICs, staff completely frustrated by the non-functioning system, substantial consumption of staff time - putting extra pressure on research activities already massively disrupted by COVID and the loss of staff due to recruitment freeze

The implementation of this system has had a massive negative effect on my research projects, which are funded by the EU (an ERC Starting Grant) and NERC. These have meant I've been unable to pay partners, including very poor indigenous community villagers in Peru who provided food to my field team over the summer, and others. I have used up a lot of the goodwill I have built up with partners over the years due to this late/non payment issue. Myself and a number of my PhD students have also been waiting months for expenses, which has put some of my PhD students into real hardship.

no clear guidance how to use the system - rules are sometimes changing - it is very confusing for new employees, no visibility

The letter is EXCELLENT - THANK YOU SO MUCH!. I would only add the failure to reimburse PGT students for expenses incurred in their dissertations over the summer, as well as delayed payments to external Supervisore for PGT dissertation students.

The new P & M has significantly affected supplies and the research that we do.

I personally have experienced a delay of reimbursement (longer than 6 weeks) from the university for expenses I paid for as part of my elected representative role, due to the new P&M system.

Our research has been heavily impacted by P&M. Reagents are taking weeks or months to arrive; deliveries from a given company destined for different labs are being arbitrarily pooled causing chaos; reimbursement for claims have been cumbersome and takes hours. My annoyance, however, does not compare to anxiety being felt by postgraduate students not receiving their stipends during a cost of living crisis. Shameful.

The DHL stop sale has meant that my research team cannot get our frozen samples back from Arctic field sites from the 2022 field season. We have hired someone to process the samples, but she does not currently have access to the samples she needs to process. We are therefore loosing both money and time and are not able to progress with our research objectives. This has impacted a NERC grant, the research progress of a finishing PhD student, and many colleagues internationally.

It has significantly slowed down the ability of PSS to undertake their usual duties.

If the final aim of P&M was to simplify administrative tasks, currently it is not achieving that aim. Also, the implementation of P&M (taking two months, with no ability to do any administrative tasks) also raises concerns over the system and the decision-making process to proceed with P&M.

My main issues were not receiving technology support through Disabled Students Allowance as I requested it on the 24th June, and only received it on the 31st October beause of the summer break and the introduction of PAM meaning that they couldn't carry out the procurement.

All my concerns are reflected by the letter.

Privacy issues that colleagues need to approve my travel expenses, Inputting travel claims into P&M is labour intensive,

Problems, indirectly affecting me: Difficult to use user interface and bad PO approval design decisions create a bottleneck in ordering consumables in my research group. Small problem, directly affecting me: for demonstrators, the UI is unintuitive and new courses this semester haven't been added, but I've gotten used to it and I've put the course code in the comments instead -- my timesheets have been approved so far.

Unfortunately searching "people and money edinburgh university" on google for >24hr returns a story from the scottish sun about reputational damage to the university caused by people and money. I've had relatives outside of the university asking about this.

I recognise many of the issues detailed in the letter.

The P&M crisis lowers my faith in the university leadership further still. How was this allowed to happen? Who thought this was a good idea? As a matter of responsibility to the taxpayer, those responsible should not keep their jobs.

As someone who saw important delays in my own reimbursement and experienced some financial difficulties as a result, I am concerned for staff and students on more precarious contracts.

I have personally sacrificed personal and family life by working thousands of additional hours in the last 4 years to continue BAU in the Finance Department and support the implementation of People and Money. I trusted that this would be recognised and rewarded accordingly, but both a self-nomination contribution and TAP form were rejected by the Finance Leadership. (my team has recently been restructured and now moved to ISG). I have never seen morale as low as it currently is in my 18 years working at UOE. This letter perfectly sums up the chaos caused to the day to day running of UOE and unnecessary pressure and stress put on the staff. I whole heartedly support it.

Ease of use, lack of understaning by all users, delays, trust in system

After arranging payment to Scan Computers I was CC'd in an email from their collections department seeking a better contact for Edinburgh Finance, as they were unable to get a response from Finance Helpline.

I feel P&P procurement is not fit for purpose, as it is, as every time we place an order we are asked to get 3 quotes for consumables that we routinely order and only have 1 supplier for a lot of our items. This puts strain on staff and can seriously delay our ability to run the hospital service. Also it seems unable to have more than one contact person email attached and sometimes the person ordering could be off sick/holidays so this increases delay time for the order to be processed/approved/placed and received.

issues with supplier payments, expense claims, grant funds reports, scholarship payments, equipment procurement.

It has affected both clinical and research work, orders have been delayed, and now not being completed as we owe companies money. Even the cake purchase for a leaving party was left unpaid.

Lots and long delays to get materials/consumables to carry out my work (including lab-work for industrial partners)

I moved from a researcher (EC funded/ Marie Curie) to a new role in IAD. I was unable to log expenses totalling £1500 for weeks and had to front that money over the summer when the old finance system was down. I've commissioned a freelance artist as part of the project who has still not been paid for work completed in August. This is damaging my collaboration & reputation.

I estimate 1% of my working time is now wasted with responding to routine P&M requests for action that an automaton could execute.

There are aspects of P&M on a working level which are unfit for purpose. Not only are prices incorrect, and change when you add items to your basket, but items in "stores" around edinburgh are not clearly marked and the user must change their delivery location every time to see items orderable to different stores. This adds multiple hours to a very simple task. Many items give the same error messages for no clear reason. There should be a transparent "bug reporting and tracking" so we can all see a list of issues reported with the system, what the proposed solution is, and how far along the solution is in implementation. This will at least allow researchers peace of mind that many of us are not reporting the same issues which are still not being resolved, and those working on the back end to understand front end issues we encounter that may not be immediately intuitive to someone not using the system.

I run a major research facility in my School which is now, essentially, running at 20% capacity because we have been waiting for two weeks for a requisition (to have a replacement part installed) to be translated into a PO. This used to be a same-day service when it was done within the School.

I don't know where to begin! I guess I'd like to highlight the existential threat we have to our interaction with UKRI. Our oversight and management of public money is woeful, likely illegal.

increased bureaucracy, time consuming

Most of your letter is very accurate to my experiences. One thing I would also like to see is some accounting figures to back up that where the system says money is being spent is accurate. For example, some students have reported their stipends being paid out to a different person's account (it is unclear if the university got this money back) and some orders for which a PO is raised and funds have been liquidated aren't actually placed with the company. To me it would be important to investigate what happens to the funds in these cases.

I totally agree with the views represented in the letter as I have seen the effects first-hand. I have worked in this University for 46 years and I cannot believe the shambles it has become since the introduction of P and M. Drastic action needs to be taken now

On multiple occasions, my orders have been approved and subsequently vanished from the system. This has led to being unable to do experiments despite placing orders well in advance, has cost much time, frustration,

and effort and it is unclear whether disappeared orders have been charged to the research grant. It is impossible to find anyone competent with the system who is able to address these issues as many hundreds of pounds are being wasted on orders which never come through and hold up research progress. Additionally, I would like to echo the lack of PhD stipend pay I experienced is an utter disgrace during the cost of living crisis.

Payment of invoices, expenses for research costs, seeing what my research budget is

I am director of the Edinburgh Complex Fluids Partnership; a knowledge exchange organisation within the School of Physics and Astronomy. Our core activity is to partner with industry to solve challenges and develop Impact from research within the University. To do this work, I have a small but growing team of post docs who work on a range of projects from a few days up to several years. As part of my role I need to be able to budget so that ECFP covers all staff costs, check that money from industry partners has been paid and make purchases of equipment and consumables to support our work. At the moment I have no way of checking my accounts as WebFirst is no longer functional and People & Money has not replicated this functionality. As far as I understand, this functionality is not going to be built into P&M and as such I won't be able to view my account income and outgoings as I used to be able. This will make my job harder and budgeting and planning much more time consuming as I will now presumably need to request reports from the finance team before I can get the information I require. This will add additional workload to the finance team, who are already extremely stretched.

Long delays ordering reagents makes it impossible to progress research.

As a grant-holder, I am appalled that a PhD student who helped at a conference in July has yet to be paid the amount we agreed to pay her, and there has been no talk at all of the need to pay her interest, which would seem the bare minimum apology to me. I am devastated at the reputational damage P&M has done, and alarmed at the pace of oncoming (yet still poorly-defined) change projects, especially CT.

My experience of the P&M problems are that valued suppliers have experienced unacceptable delays in payment, which has caused them cashflow problems in an already difficult economic situation, and so negatively affected EPCC's professional relationships and threatened our reputation. The University has a responsibility to deal fairly with external businesses but it has fallen short at the worst possible time.

I can add multiple examples of payment failures seriously affecting partner organisations in the global South.

Unpaid expenses dating back several months.

People and Money has be catastrophic. Our relationships with our research partners and suppliers are damaged, financial robustness and due diligence is continually compromised, and the morale in my team is at an all time low. Staff will leave if this continues.

I am a PhD student and my stipend, which I depend on to pay rent, eat, and support dependents, was paid 3 weeks late with no advanced notice that I would not be paid. Student stipends do not afford the luxury of keeping savings in the event that the University unexpectedly fails to pay us.

On one of my AHRC-funded projects, a small Syrian-run NGO in Turkey had to eventually stop working because they face imminent financial collapse because of several delayed payments. This is an important and trusted partner for collaborative research and community engagement - now they seriously reconsider whether they would like to work with us in the future. What concrete steps will the University take to ensure that future payments will not be delayed?

I support the Elected Senate Members' letter

I am involved in Student Support and the way that the University has palmed off any soltuion to the non-payment of stipends onto The Advice Place for hardship funding is shocking. It is OUR fault that students did not get paid and yet we expect EUSA to pick up the pieces? Staff in EUSA Advice Place have also been directly affected, being inundated with requests for help because we have put our own students into financial hardship.

Frustrations in many aspects of the new system. Most notably not being able to order internally from local Stores for so many different reasons. The system and interface is complicated and the format seems old and outdated, could they not have a least given us software that was modern and intuitive to use?!

The letter very effectively captures my feelings

I think the current People and Money crisis is an absolute disgrace. I see valued colleagues suffering high levels of stress and anxiety every day as a result of this appalling implementation

Our team are unable to perform the post award side of our jobs. This is impacting our ability to confirm budgets and in particular where this involves staff. We can't give a definitive answer if staff can be extended or not. Final claims are being delayed up to 5 months. It's a very stressful time for our researchers who are inundated with administrative burdens when they should be focusing on their science.

The problems are many. Excessive difficulties sending couriered shipments, non-payment of bills from our suppliers, excessive needless administrative burdens, complete lack of response to any queries/complaints from appropriate staff, lack of accountability for the people who institute such a shambolic change - clearly with a lack of suitable contingency planning

Last year (2021) I was the TA for the course NLU+ and MLP, both very flagship courses in NLP and ML and may be the very reasons why so many international students choose to come to Edinburgh Informatics (which is a large factor of the school's income). I and other students of teaching supporting roles did not receive the stipend for nearly half a year due to the deep incapability of the P&M system, which severely harmed the teaching quality and aspiration. The P&M system is **ruining the root of the schools reputation and success in a profoundly fundamental way**. I will flight for firing the P&M system.

The difficulties in simply ordering basic supplies and searching on P&M, ordering non catalog items now takes so much time and effort compared to previous systems

Points not represented in the letter: total disregard of feedback from the Schools during the design of the system, timing of the implementation (end of financial year, removal of experienced staff from school that led to hiring of new inexperienced staff anyway). Fundamentally, centralisation, removing local expertise and decision making from school is wrong. Questioning the integrity of staff is another example of mismanagement. Will I ever want to squander the hard earned research income to treat myself by 5* hotels going to conferences? I, or my students can find in 5 minutes better deals than those offered by "professionals" arranging our travels. Arguing with them is a waste of time, fuels creation of the "us" and "them" culture. Would university really expect anybody work enthusiastically on delivering its goals when it creates an atmosphere of mistrust at all levels?

I am on attachment at CERN in Geneva and this has had a huge affect on us students who are abroad and are out of pocket. For me personally I am owed about 5 thousand pounds.

On top of the letter mentions, P&M debacle has caused substantial tension between professional & academic staff at different ends of P&M, with both struggling on different ends.

The effects of this crisis are felt right across the University from students to researchers. We need solutions now and these must be communicated. Currently it is not clear that things can and will be solved.

Because of our inability to order radioactive iodine cats have died as they could not be treated for their hyperthyroidism

Ordering things was simpler before but now, I am clueless if the order is through or not, and if there is any delivery date etc.

Communication about P&M problems - when I submitted a complaint about the nonpayment issue, the university advised me to take out emergency loans and go to the "listening service" for the financial hardship and stressed caused. I have not had a response to my complaint after more than 6 weeks.

(1) Staff are in some cases racking up large expenses claims (thousands of pounds) in order to ensure timely payment of bills that should be settled directly by the university. (2) There is a total lack of transparency about what happens once we click the 'submit' button on an order or expenses claim; I can't find out who is dealing with a particular transaction and it's impossible to get through to the purchasing team by phone. (3) I note that the School of Engineering's own finance staff have been fantastic and have gone the extra mile trying to help us navigate the system.

My personal experiences with P&M is with the impact on fieldtrips and that bills are not being paid with our accommodation and this jeopardises not only the possibilities of us using them again, but also the financial viability of those business too. I particularly support the parts of the letter that state the stress that P&M and other initiatives such as using Diversity Travel, have put on our Professional Services staff as they try to make broken systems work. I would also assume that staff in the Finance Office must be having a horrendous time.

Cannot access the funding details on my research grants - I have no idea how much funding, if any, remains. Cannot order from some key suppliers because of unpaid bills. Cannot have goods ordered months ago delivered because of unpaid bills. Cannot use DHL - unpaid bill. Ordered batteries for lab equipment on 21st Sept - still not delivered. Ordered chemicals for research on 20th Sept - still not delivered.

The impacts of P&M at a local level have been awful, resulting in negative impacts to our students, staff and suppliers and basic services. Orders are extremely time consuming and taking inordinate amounts of time to be processed.

I fully endorse the content of the letter. This shipwreck was entirely foreseeable to anyone with a minimum background in engineering/IT. Running a project of this scale without appropriate consultation, without smaller scale pilots, and without suitable backups/contingency plans whatsoever demonstrate the incompetence and reckless attitude of all those involved.

Luckily, I have now been reimbursed but after beeing on fieldwork for 10 weeks with a mounting credit card bill and no way to even raise an expense because my profile was set up in a way that prevented me from even opening a claim. It took months to get this resolved and I have only just received reimbursement.

In addition to the wide-ranging and severe impact on staff, students and our suppliers already clearly articulated in the letter, I just wanted to add the sheer incredulity at a system so clearly not fit for purpose being allowed to be used in a production environment in the University. I am not aware of the project management particulars, but this is really outside of the normal professional software development standards and is really unacceptable. Why was the system not fully tested? Why did the original system need to come offline for 3 weeks prior to implementation (absurd, that's what test environments are for), why was the new system not backed out and reverted to the old system when it was apparent this was not working? Why were NO workaround processes in place for critical activities such as payments? This is basic risk management. And failure of this has had a huge impact.

I am a PhD student at the university who is also undertaking part-time tutoring and teaching responsibilities. As a PhD student, the lack of clarity around the P&M expenses / claiming back has been extremely frustrating. I am expected to go to conferences and haven't been reimbursed for the costly conference costs nor given any indication of when we can expect to have an answer from the finance team about when we can actually submit. Further, the situation with the PhD stipends and not paying people the wages they are due is truly shocking. I am extremely disappointed in how this entire P&M system has been implemented and the lack of response when people have flagged these issues with the P&M system. There seems to be no accountability for anything that has occurred and it is extremely disheartening and embarrassing. Thank you to the Senate working group for collecting these responses; clearly there needs to be a reckoning.

The letter covers my concerns and requests fully.

We held an event in September to which 250 colleagues from European partner institutions were in attendance. Suppliers have still not been paid and the time invested in placating and looking for alternative payment solutions has been considerable. Local suppliers are angry and unlikely to consider the University for

future events. We are also coordinating a significant European project, 1Europe, that is funded by Erasmus+. The Project ends on 30th November. Funds need to be spent and reconciled before the end of November with payments made to our European member universities but this cannot happen because of P&M complications. We also have to provide an audit certificate by the end of January and without being able to access key transaction reports and make final payments, we're unlikely to make this deadline set by the European Commission and this will have implications.

I fully agree with everything that is written in the letter.

P&M has had a huge affect on workload both with the new finance changes but also beforehand with the HR changes and expectation of more involvement of staff in the recruitment process

Complicated, long-winded and very slow process re: having (relatively) small expense claims paid.

Many suppliers and public contributors have been waiting months for payment, causing risk of reputational damage to us as a new organisation

My name is wrong on many entries of the system, so P&M should fix that

We are still paying VAT for exempt items and there is no guidance from the University if they will reimburse our costs.

Increase in administrative work, decrease any service to students. Doesn't make sense for teaching labs being unable to quickly access stock items from in-school Stores without going through laborious ordering process.

An open forum platform is needed to interact and re-build good relationships with suppliers

The added workload has not been considered. Orders now take days, previously next day. Cancelation of UK NERC users to the Facility.

I think two things: 1) There should have been information (such as new grant codes, brief workshops on how the system functions) before switch over so that this transition ran smoothly, 2) the old system of submitting order forms etc should have been kept in place for several months to ensure redundancy. A sudden shut down of the old system with the new system untested and unused by academics has been pretty catastrophic for ordering, running a lab etc.

Most of the problems we are experiencing in EGBU, are covered in the letter. To emphasise the main issues facing our team are: the wholly inadequate training on the new system; the increased time it takes to process transactions; the more complex and confusing way to process student payments than before (offline); the time we have had to take in order to practically train ourselves in P&M - without the support of the many Teams groups this would have been even worse. I would also like to add that the way it has been implemented has been incredibly stressful. There was practically no prior information about how the system was going to work - we had to figure this out ourselves. Also, no consideration was given to how this system was going to affecting individual staff jobs. Why was there no attempt to involve staff well in advance of the system going live to test if it was going to fit with our work? P&M is a huge cultural change in how Finance is processed. To have no prior warning other than a few Powerpoint slides before the launch, no detail whatsoever, is quite unbelievable. Departments at the University are diverse eg. as the International Office, we process a large number of international payments. We still to date, have not had conclusive advice on how international suppliers are to be paid, resulting in huge delays to international suppliers who are incredibly important to the work of Edinburgh Global. One staff member had to use his own credit card to pay for an overseas event. Having to email every single problem to the Finance helpdesk sometimes receiving a reply a month later, is a really inadequate system.

I paid unnecessary NI due to the delay from P&M system.

The Creative Informatics Programme works with creative businesses and freelancers, dispersing funds for R&D. The delay in receiving funds and lack of clarity of communication on timelines is causing distress and financial hardship for our recipients, and projects are pausing work due to lack of funds available to continue. The

project has built strong and trusting relationships with the local creative community and the current situation is now damaging these relationships. Our delivery team are under considerable stress trying to manage the additional workload caused by the issues with people and money, both from the administrative burden and the external relationship management requirements of the situation.

Payments to collaborators, and suppliers are still outstanding, 3 - 4 months after they were submitted for processing. We rely heavily on have a good relationship with our collaborators and suppliers, and this situation is leading to significant issues.

It would be nice to be able to get an overview to see where things are at in P&M (e.g. tracking orders)

Colleagues and I have suffered from many of the issues raised in this excellent letter. We deserve a gigantic apology from the centre and an undertaking not to roll out any more initiatiatives without proper consultation and field testing.

We are very much missing Insight as a supplier, more of a procurement issue than P&M but it was there before the change and it's not now so it still counts. There is no easy way to 'find' the punchouts. There used to be a menu page where you could see all the available suppliers and click on the links but now you have to use the Search and use the exact name (ie HP and not Hewlett or Packard). Non-standard quote done in the HP punchout are not carried through so a saved quote needs to be sent as an attachment along with the order (sorry request) so that procurement can order it from scratch. I have delegated permission from my line manager so that I can approve Annual Leave for my team. This however carries across into the finance part so that when I place an 'order' it passes by my line manager and comes back to me to authorise - the one thing I thought we wouldn't be able to do i this new system. I even got an unconnected colleagues expense claim to authorise last week because his line manager had given delegate permissions to my line manager while she was on AL and that of course then got delegated to me. I have not and will not authorise any of these things other than the AL requests as that's what I have been tasked to do, but the permissions should be separate. Orders from Banner have been on hold due to non-payment of invoices, practically this means that although I ordered some parcel tape in mid-sept, I'm still waiting on it. We literally can't proceed with Business as Usual because we don't have any parcel tape, unless I go to a shop and buy some myself! We receive new laptops, install them and then box them back up for sending them out. Such a simple thing but an example of being held up.

I has negatively affected many students in the Centre for Doctoral Training I direct (e.g., unacceptable reimbursement delays; students depend on running experiments and affect their research and well-being)

I only look after one multi-partner UK based consortium with 13 partners but even that has been stressful so I can only imagine how awful it is for front line staff.. Payments are outstanding to small community projects, third sector/charities and academic partners - and I cannot give any kind of informed or realistic answer which undermines my credibility, that of the PI and the University as a whole. The communications regarding this have been dire both internally and externally. I couldn't even provide a figure for our financial summary for the funder annual report that was due in September as I was told: "As we are still dealing with some initial issues and a back log of expenditure to be processed through P&M, unfortunately at the moment I am unable to produce the figures you are looking for. We are hoping to be able to do this in a couple of weeks and I will be in touch as soon as I have more information for you." This response was all that the finance team could do but doesn't help. I had to guess the amount for the report in the end. On top of a contract/amendment system that takes between 6-12months (at least) to process budget amendments, whilst partners cannot do work until this is in place, Edinburgh University is ill equipped for any kind of post-administration and its reputation damaged beyond repair with some very important partner institutions and suppliers.

The people who make the decisions to transition to a new system without proper checks may have a high enough salary that they can easily weather not being paid for a few months, but a lot of people cannot. You shouldn't have to be independently wealthy to work for a university.

I fully support issues raised in the letter - particularly the system's failure to ensure basic routine finance operations with even internal suppliers

P&M is supposed to electronically send the PO to the supplier. For some suppliers this has not been happening and the procurement team have suggested that we (the requestor) should telephone the order through to the supplier using the PO the purchasing team have raised - if the system is broken, it should not be up to the requestor to place the order with the supplier, this is still part of the procurement process. Additionally, I place orders on behalf of the School, some research is VAT exempt and some is not VAT exempt and I need to decide when I place the requisition which category it falls into with regards to VAT exemption. I have had no VAT training and threatened by the UoE tax office that if I don't pick the correctly that the University could be given a large fine by the HMRC.

The key point of my experiences with the P&M have been: 10 weeks of inability of ordering and paying outstanding purchases (worth 70k), causing unacceptable delay in international research collaborations and loss of reputation in scientific community and with contractors/suppliers, in particular since most problems persisted, now for O(8) weeks since switching the new P&M system live - any company would be bankrupted by such..., now think BA and the national news we would have... - not training the local accounting staff before starting the system is unforgivable, letting them figure out the idiosyncrasies in the group chat..., and the written documentation not matching what one finds on the screen is putting anyone off, accounting staff and normal users like myself... - on top of the huge time wasting (like needing 2 weeks to get a roll of tape available in stores...) for technical, research and administrative staff for fire-fighting a house which feels like burning on every corner..., - the loss of control over the processes putting people into despair (e.g. causing engineers and technicians privately buying consumables of their on salary to get the project done...), letting excellent people to consider leaving the institution, a brain-drain which severely damages the capabilities of the UoE to compete in research and education, in particular as some of the loss of control apparently is built-in by design (e.g. omitting the project-route for approving purchases, while the line-manager-route clearly is unfit for purpose for any workshop or research group environment), continuing the ongoing development of centralising procedures, oozing distrust in the local staff (removing all possibilities to run deferred decision arrangements, now our head of institute has to approve every £0.31 connector for a lab-based project he is not involved in and has no detailed knowledge of...), and introducing one-size-fits-all approaches, hugely increasing the amount of administration at the cost of research/education effort/time as well as inhibiting the effective and efficient use of funds (e.g. after new rules being unable to fully use obtained funding for RA salaries, as one cannot update the usage to adapt to the changed situation/opportunities, e.g. after people changing jobs during the grant period and one cannot combine funds to create a new position) - there is more to say, I stop here...

My team are responsible for School staffing support and all recruitment; we have been suffering the negative effects of P&M since its launch in Nov 2020. Two years in we are still having to navigate long winded workarounds to carry out the simplest of tasks with no resolution in sight. The irony is that prior to launch were worried about redundancy and losing our jobs to a new system when in fact we have had to upgrade staff and increase the size of my team just to get through the additional work the system has created. It is only now that P&M is having such a wide reaching and catastrophic impact on all staff/students and externals suppliers that the issues are finally out in the open. The lessons from the launch of the HR phase should have been learned and future phases halted until issues were recognised and fixed on the HR side.

As a student I don't use P&M but the reimbursement is now handled manually such that I'm waiting for 2 months now to get reimbursed

New system implemented during the peak of matriculation - staff had minimal training on the new system to be able to assist with student queries. Still ongoing problems and still minimal training provided. This has been a very stressful and de-moralising time and end does not seem to be insight.

major impact for grant the last 3 months of which coincided with P&M launch timing- major waste of time and distress reflected in letter

P&M has significantly impeded our ability to order goods. Moreover, work such as PO generation has now shifted to my group members whereas previously this was done by dedicated staff in stores. There is a perverse need to approvals for everything such that busy people have to deal with an excessive number of

emails and many things get lost. Why are researchers suddenly doing administrative tasks that either never existed before or were dealt with by professional services? And on top of that, the system is ridiculously slow!

I have been unable to claim expenses for cohort building activities for the taught MSc that I direct. I have had to use personal money to fund these vital activities and do not know if or when I will be able to claim it back. The amount is approaching £1000 already.

Creative Informatics programme disperses funds to start up creatives to allow them to develop businesses with data-driven innovation and creative tech - the payment system is elongating the time it takes to make good on some of our grant awards and is pushing already vulnerable freelance creatives in start-up mode into very stressful situations. Although these may be small amounts in comparison to other payments being made by the University, I ask that priority is given to the most vulnerable. The reputational risk is also a concern after 4 years of building a trusting relationship with creative innovator community that we wish to take with us into EFI.

Slow, unintuitive, inefficient, creates more problems

Reimbursement of expenses was delayed. I managed, but it was not pleasant. I have decided not to travel in the nearest future, until the bottlenecks are sorted.

A well worded letter that captures the major problems. I consider myself a resilient leader, but I have never felt so stressed, powerless, and embarrassed for staff and students, in all of my professional career.

I am painfully aware about the situation and am now limiting myself by not applying to conferences because I don't have the means to pay for it myself and wait for reimbursement. Every activity that requires paying from my own credit is now postpones and I'm anxious when there is an activity I must go to and will have to deal with the problems related to PnM. Thankfully, I didn't encounter major delays with my stipend yet.

We are running out consumable items of the Laboratories. We can't order in perfect way. There are lots of complications to order the items. It might be easy system to run our research smoothly. I think for this unwanted system University lab research went backwards. Please solve these issues and make it easy for researchers.

Two of my recent contracts started with me not being paid for 2-3 months due to issues with P&M

An independent supplier (young woman artist) hasn't been paid for over 2 months and has caused serious financial distress for her. This is unacceptable and contradicts the University's stated interest in EDI and social responsibility.

I have been waiting for £1500 in expense claims for more than a month now.

Summarised well in the letter, huge disruption, time wasted and loss of reputation and loss of trust that grants are not properly administered

I didn't receive my PhD scholarship stipends for 28 February, 28 March, 28 April, 28 May on time, and had to be back paid once I worked out that I hadn't been paid—I believe this was an issue with the central finance team not setting up an automatic payment. I also didn't receive a contract for the tutoring that I did for the school of informatics in semester 2 of the 21-22 academic year until near the end of the semester that I was teaching—I think this was due to understaffing and the difficulty of using the people and money system, and didn't get paid for my teaching until 5 months after I received this contract, and only after many emails to many admin staff within the school of informatics complaining about this. Due to being payed in one lump sum, I have now been autoenrolled in a pension scheme that I now have to unenroll from and am technically over the maximum 9 hours per week that my visa allows, despite not having actually worked more than 9 hours per week.

I have a dual role, managing HR at a School level and supporting the PGR community. The sentiments in the letter match my experience of the system and the feedback I have received from colleagues and students. The

HR side has been improving since it's full launch in April. I'm still hopeful that the finance side will show improvements (quickly), however, transparency and communication continue to be serious problems.

As a requisitioner, P&M is extremely cumbersome and awkward, and is not intuitive or user-friendly even after several weeks of familiarisation. It is slow and buffers, too many clicks between pages, punchout suppliers are not listed, error messages appear with no indication of how to resolve. I know have to dedicate hours, rather than minutes, per week to placing requisitions.

Thanks for the letter. As a frontline P&M user, there are too many problems to note here; I would, however, say that the headline regards problems that my colleagues and I are facing is a general lack of departmental visibility as to what stage our various enquiries are at, predominantly regards the finance side of P&M.

Letter is great. Responsibility means that both Director of Chnage AND Principal need to depart ASAP. This crisis needs to hire a professional change management company. And the software conceptually is not fit for purpose. That needs to i) unload academics ii provive Professional support staff with all information iii) be simple and intuitive to use. That may cost £50Million - who knows. But the alternative is loss of the institution.)

It took months July-October to receive an advance and related expenses

I am a PhD student (and struggling with the cost of living as it is) and it took P&M a little over a month to reimburse me for money spent at a conference, AFTER the month I already had to wait because they were closed.

The P&M delays have resulted in one of our core partners withdrawing from the project. The lack of payment meant that they could not pay their staff. This partner is comprised of a team of Syrian refugees living in Gaziantep, Turkey, who are under considerable strain already. Our second Syrian partner organisation is being hounded by the hotel for payment due to the lack of payment. This is really stressful for the individuals concerned as it is affecting their reputation (which has been in good standing) in Gaziantep- which is a relatively small city. In Turkey, Syrians already face some discrimination and racism. This development has had a significant impact on them both personally and professionally. We have two upcoming projects- and it is not clear to me yet whether these partners will work with us again unless we can guarantee payments are more reliable.

Reading the Finance Processes - Community Teams channels gives a very good insight into the many problems that professonal services staff have had to cope with. It makes miserable reading and demonstrates the completely inadequate resources that were put in place to deal with the implementation.

I manage a procurement team. The effect on their morale and mental health is unmeasurable and they are actively looking to leave the university.

We have many suppliers who we need to perform critical services who are now refusing to take on new work with us. We had a number of exiting sponsorship and marketing opportunities we have now lost, and also the guidance has been written for someone who clearly has super user access. Not acceptable at all

Orders and travel reimbursements were resolved in reasonable time and without complaint. Now, they are heavily time-consuming processes for researchers and professional service staff alike. My transition to a new contract also came with many time-consuming steps I didn't have to take with the old system.

I am responsible for operational management of the Erasmus+ International Credit Mobility programme, which includes instructing colleagues in Finance when Erasmus+ grant payments should be made to students. The implementation of P&M has affect me and the students I disburse grants to in the following ways: 1) my team received very limited training. I was on annual leave when the training was delivered, but feedback from colleagues who attended the session indicated that it tried to cater for too wide a group of colleagues, which meant that the training wasn't specific enough to the needs of those of us who make Erasmus+ grant payments. I've had to rely on notes from my team colleagues which, as I understand, were obtained through follow-up calls with a colleague from Finance and this only happened after weeks of requesting

guidance/trying to obtain clarification on the process. Furthermore, data provided to us at the start of the process was not accurate (e.g. budget codes) which further added to the confusion and lack of trust in the system. 2) The payment process has always felt archaic but at the moment, apart from being inefficient (I often find myself working from multiple spreadsheets to complete 2 spreadsheets that need to be sent to Finance) it is also not secure. We are required to send spreadsheets with students' names and bank details via email. These are not encrypted and given the lateness of the implementation, for the sake of processing speed, no longer require a senior colleague's sign-off. 3) For a big part of the P&M implementation process, we were advised not to mention to the increasingly anxious group of students that the delay is caused by the new finance system. It has put a lot of stress on me and my colleagues as we were not able to justify the delays to the understandably worried students. The students rely on the grant to support themselves while on exchange and many of them blame the Study and Work Away team for the delays. 4) The delays to payments being made mean that we, as an institution, are in breach of our contractual obligation to the British Council and the European Commission. The Erasmus Charter holds accountable to disbursing grant payments within 30 days from grant contracts being signed by students and the University. This might result in financial penalties, damage to the University reputation, and ultimately loss of the Erasmus Charter. 5) Not knowing when grant payments are likely to be made and not wanting to add further work to colleagues in Finance means that we are unable to respond to students' queries which are often desperate. For example, we have grant recipients from Russia who are struggling to access their savings from their home country, and cannot receive the grant payments they are due. On a number of occasions, our only recommendation was to turn to the Advice Place for temporary financial help but this is obviously far from ideal. 6) On completion of exchange placements, mobility participants are required to provide feedback through an EU feedback questionnaire. One of the questions is around the grant – i.e. whether it was paid in a timely fashion. Given what's been happening, my colleagues and I will be required to justify the very likely negative scores which are going to bring our overall rate down and may trigger an audit from the National Agency.

Impossibly complicated, largely unsupported by knowledgeable people, slow, and prone to crashing. Nothing about this system is intuitive or helpful for end users.

They have been covered in the letter: slow or inexistent processing of purchases, inability to claim expenses back

Unable to purchase from our main research grant which has only a few months left to run

Suppliers have experienced unacceptable delays in payments and the P+M processes has created additional steps and duplication and less transparency for Users, while no Remittance are being issued to Suppliers. For such an important system, it should have been put through a robust testing period with specific training offered to departments, who could familiarise themselves with a 'sandbox' version and raise any issued in advance of the launch.

We have never been told what issues P&M was supposed to address, what was its added value, we can only see the problem cause without knowing the motivation behind the transition

I was unable to spend funds from an award I received before its deadline, and as a consequence I finally lost these funds.

Thank you so much for taking the initiative to write this comprehensive letter!

I don't know what the acronym ESC stands for. 'The ability to search for products or terms within the system is inadequate' needs rephrasing. I note 'Instigate a timely and rigorous inquiry into the choice'. Other HE institutions (Birmingham in the UK) have adopted this system with similar problems. When I mentioned to a visiting speaker (from the US) her expenses claim maybe delayed because of our new system, she asked 'Oracle?@ and just rolled her eyes when I confirmed. So the sorts of problems we're experiencing were already known. Were they factored into the 'choice' and the planned implementation?

Fellow students have been waiting for expenses claims of £500+ for over two months, stipend payments have been delayed or paid to wrong bank accounts, and internal ordering is an absolute nightmare, severely

disrupting research productivity -particularly detrimental to PhD students with limited time to complete projects

I have (luckily) received my pay, unlike others, but have had to fund participant payments from my own pay in the last 3 weeks. Emails with my request to withdraw funds from the research grant have gone unanswered, and I have spent hundreds of pounds of my own pay to pay our participants, to ensure that our volunteers feel valued and will return to participate in our future studies. This is during a cost-of-living-crisis, whilst I am also having to fly abroad to visit a very sick relative (for which I'd been saving up, and those savings have partly been used to pay participants). That's just unacceptable.

Regarding point 9., future changes: I think it's even more important that no one significantly involved in either the oversight or the implementation of the P&M finance system is ever ever again involved in rolling out University-wide changes to *any* system. This is not just about personal consequences, but about protecting UoE business in the future.

My main concern is towards the new ordering system where it's very complicated to order consumables and this causes big delays in completing experiments.

for me the failure of the system is captured by myself and a postdoc (grads 10 and 8, respectively) having to spend 60 (yes, 60) hours (not counting the hours put in my the HR team) on P+M issues to be able to advertise (yes, only to get the advert out) for a position worth 100 hours at grade 5.

My PhD research has been significantly stalled because the university has been put on stop sale by courier services, so I have not been able to import soil samples from international collaborators.

having to apply VAT exemption certificate per item on an order, so if you order 10 items from 1 supplier you still have to attach exemption to each line of the order

The time it takes to process an order has almost tripled. I work in the HfSA and I am a nurses working in busy service. I order lab supplies for the whole hospital and I find this P&M process so tedious and time consuming. It seems a very repetitive system and a lot of it I don't understand. The process before I was given a PO number from accounts, I would place my order online, once the order arrived and was checked off I would send the delivery notes to accounts and that was it. I could place an order far quicker that way.

Time delays in ordering/delivering lab supplies has caused enforced, unwanted changes to lab courses/reduction to the experiments available. Also a lack of information passed on about the status of any orders ie. no tracking information, no confirmation of items being in stock, no confirmation of how many items are still pending delivery, no lead time information. This is a problem for planning teaching labs and being able to ensure we have enough kit on time for the ever increasing number of students. The restructuring of how local Stores is also causing huge delays in being able to repair kit on the fly during lab sessions. It is important that we can repair/replace parts immediately during lab sessions, however now we cannot collect what we need from Stores straightaway, rather it goes through the whole approval process and the kit can take days to be repaired. This causes stress to the students involved since they now have a limited time in which to complete their work.

Endless list of issues

Procurement of research consumables are super difficult.

The changeover has led to our partners in Tanzania being out of pocket, damaging the goodwill we have been building up to establish a solid research partnership. I suggest that the persons responsible for insisting on the change should write a message that can be passed on to such partners

Extreme delays

We have financial reports due to NERC including a FES on an £8.5M research and training grant which ended in October 2022 and are unable to access transaction reports which we can understand (and trust for completeness). We have asked for delays to return the reports but have no perspective and not timeline to get

the much needed reports. There are a number of financial transfers which will need done once we have the reports screened to complete the FES and no certainty of being able to do them in time for our new deadline. While managing the grant itself has been a success during the last 8 years, this might well waste all our efforts and good work which is really heart-breaking. This might also affect our chances to get a new grant in the future. Stress level is really high as a consequence and this is only one aspect of it, launching P&M every day to check progress on requisitions approval and invoices is becoming a real anxiety generator as well as apologising to suppliers waiting for PO numbers or payments. This is simply unbelievable that a so well-known and established university and employer managed such a change so poorly.

Did you mention that there are no longer any eITs, so no way to transfer funds between one part of the uni and another?, we stand to lose money completely as we can't spend the grant. I also know of people who are not getting their redundancy money, which should tide them over between jobs. Uni owes me about 2 grand in expenses. Two contractors not been paid since July. The list goes on....

P&M is a disaster and not fit for purpose

Due to the current circumstances related to P&M, our department has been struggling to obtain materials necessary to meet business critical demands. In particular, research/teaching and general infrastructure essential materials/services.   This has partly been due to downtime during the P&M transition and delays with the new system going active, and lack of appropriate operational training being provided (with local school staff and management providing the only real support to try and deal with this), but more recently due to a lot of suppliers placing the school on credit hold.   We have also experienced additional drain on our team's resources. This has varied from dealing with disgruntled contractors and suppliers asking us to get involved on their behalf, or having to devote already limited resources to find and implement temporary workarounds in order to meet school needs.   In addition to this, we are finding that a considerable amount of staff time is being devoted to financial related items not covered by most people's job description or previous experience and training.   From feedback and comments that I have had fed back to me from various sources, this feels to most that they have been forced into performing additional and unrewarded duties on top of already busy workloads.   A recent comment I overheard had someone summarising this by stating, "I feel like I'm doing the procurement/finance department's job and not being paid for it"

Reinforcing concerns outlined within the letter, i have anecdotal information concerning both professional services staff electing to leave employment with the University of Edinburgh due to the roll-out of People and Money, and of local SME's being exposed to risk of bankruptcy due to non-payment for services. As outlined in the letter, i consider this to be a grave matter for the Universities external reputation and internal functioning. I join the call make by this letter, particularly with respect to its proposal that P&M's fitness for purpose is immediately reviewed, and that this crisis lead to a halt to other planned acts of systematisation pending review of lessons to be learned.

The change to P&M has affect my ability to manage budgets. I previously used Webfirst to access different accounts (grants and G accounts) and to view spending and balances but this is no longer kept up to date. Also the members of my lab have spent an unacceptable amount of time working out how to order, chasing orders that have disappeared and re-ordering. This has taken away from research time. Together with ongoing supplier problems (due to lack of payment) I am concerned that we will not be able to deliver our projected outcomes to the funding body (MRC).

More emphasis could be put on the additional hurdles now in place to obtain essential safety equipment. I have a PhD student working in a chemistry lab and I consider it one of my most important duties to provide a safe working environment for them. They need gloves to do their work in a safe manner but with P&M we have had to wait for over a day to receive these items despite them being available in our stores. Under the previous system, we were able to collect them almost instantly.

In any normal business, somebody would have gotten the boot on such failure. It would arguably be more symbolic than anything to solve the problem at hand, but it would set standards.

I still have not been payed my full stipend amount for the first three months. The expected pay date was the end of August.

Missed an invoicing deadline for a Wellcome-funded project, damaging relations with major partners; turned down a small grant for student placements because of no mechanism for accepting the grant or using it to compensate students

Lack of training on how to use P&M and enter tutoring hours caused me to miss a T&D time submission deadline, resulting in payment being delayed to the following month.

As an international student, the delay in receiving my paycheck is not only unaceptable because of how necessary this money is to me but also because I am simply not allowed to work more than 20 hours per week and cannot have all the hours I do in one month be represented in the following month as it is a breach of my visa contract.

could also emphasize the reputational damage to science collaborations by being unable to reimburse visitors and start collaborative work

As a stores officer I am customer facing and am the point of call for the end users frustrations. Where as with previous systems I was able to help because of my limited access to P and M I feel that I am letting down my customers and giving a poor service through no fault of my own. A job that I love is now a negative and draining experience.

Along with the delays in payments, the University is also lacking a clear communication on how the increased UKRI rates will affect for those who was externally funded but got extension funding from the school for their PhD extension due to pandemic. Some PhD students including me has been paid in a different UKRI rate than those who are in similar situation to us. We don't know where this inconsistency results from.

I am unable to access the system so have not seen any pay information for 2021/22 or the new academic year to date. I also recieved an unexpected large tax bill for the academic year 2021/22 and am unable to access payslips to investigate why this might be the case and to discuss with hmrc.

I have seen close up how difficult it is to get things done. A simple process of changing funding allocation from MRC due to move of postdoc to the University of Dundee has taken nearly 5 months now, and still hasn't been completed!

Promised UKRI 10% raise (see link) on Ph.D. stipend not received due to P&M.

I can't understand why the University would roll out such a large scale system without having let the people that are actually going to be using it test it beforehand.

Our service has lost 3 Centre administrators in the last 18 months. The stress from working with People and Money was a direct contribution to these resignations.

As a member of university staff for over 37 years I cannot recall a more botched and disastrous attempt to introduce a new University of Edinburgh system. The demands and strain put on professional services staff during this period is without doubt becoming unbearable and on top of recent workload issues during the pandemic will surely compound a mental helath crisis amongst University staff

Substantial additional adminstrative burden; loss of consumable suppliers due to outstanding payments; difficulty with staff onboarding and grant launching

As a PhD student I'm no longer receiving payslips since the implementation of the P&M system and have no login to access these myself. I need these payslips as proof of income in order to receive help with childcare costs.

I am Lab Manager of a Large research group in CCBS (Grant Lab). For the last 2 months I would say most of my time has been spent trying to navigate the new P&M system and deal with the numerous difficulties and

problems it causes so that we can keep the lab running smoothly. One of our new PhD students did not get paid their stipend for a month and a half which caused them severe stress and financial poverty. I had to loan them some money so they could buy groceries and pay their bills. The simple task of ordering consumables for the lab now takes me 3 times as long because there are far more steps to enter into the system. The POETA coding system is not great and it is far easier to make mistakes when entering grant codes. I used to be able to order and approve things for the lab myself, now the approval has to go through the PI so this is again more steps and more work for people which equates to likelihood more errors. Some suppliers such as Insight have been removed from the university system despite 10 years + good business relationship. There was no explanation given why this was and when pushed because Insight was selling computing components at far reduced price than Dell or HP punch out I was told to put the order through. However, it took so long for the PO to be generated that by the time Insight received it they no longer had the components in stock. This has also happened with other companies. It is taking too long for PO's to be generated. I used to be able to raise a PO myself so again more people involved equating to more work and more errors. I have items sent to other building because POs ordered for same company on same day have been lumped together despite being ordered by different labs and so I have to spend time locating where my orders have been sent to.. I have spent time showing colleagues in other labs how to use P&M because they found the training not very helpful.

P&M is causing irreparable damage to the University's image among staff, students, suppliers and potential staff/PhD students. It is entirely Vogon in its overly hierarchical and bureaucratyic view of things which does not reflect many management/organisatinoal structes at the Unviersity (e.g. research grants, projects, interdisciplinary work). We have replaced a series of excellent systems (eIT, eExpenses) with something non-functional. If any ordinary member of staff made such failed changes to systems/process they woudl be put on a PIP at least.

The system does not take into consideration that some people need to order a lot of things every day. A 5-minute task is now taking 10 times longer-time that we do not have.

P&M has been problematic from the beginning, including "Time and Absences", with duplicated members of groups, wrong job description and holidays quota still wrong despite several service request submitted to the Help desk

P&M has made working life much more difficult. Putting in expenses is a nightmare. It is almost impossible to work out ones annual leave entitlement. I cannot easily see the leave position for my line managed staff but I can see those of the staff who report to my line manager. I need to allocate work to staff to deliver upon our contractual obligations to UKRI but cannot see which staff are on leave and which are not. As a staff group we spend inordinate amounts of time discussing how best to work round the limitations of P&M. Seeing the recent article in the press about it just highlights the reputational damage being done to the University, nevermidn the staff, students and supppliers who are not being paid.

Thank you for organising this excellent letter - it describes the problems extremely well.

Having heard stories from many others across the university, it is difficult to quantify the reputational damage, both internally and externally, that this has done; no longer is the university an institution that can be trusted to pay their bills, their staff, or their other obligations. For the students, whose budgets are already tight, the stress of not knowing if and when we will be paid is felt especially strongly, and the reasurances so far have been pitiful. All I can say now is that I may be paid around the end of the month, if I am lucky. As both my wife and I depend on the uni for our income this is particulary stressful, more so given that we have just bought a house and have a mortgage to pay. Please keep this anonymous. Thank you.

Many everyday processes, such as trying to see at a glance which staff are off in a given week, have become impossible which were easy in 'who's off'. We were told P & M would be intuitive, but it is quite the opposite. The terminology used (such as 'onboarding') is alienating management-speak, and the processes are very heavy-handed for what should be simple tasks.

I was supposed to order a microscope in July after a grant application to BBSRC ALERT successful. Of course, the PO was not generated by the cutoff for ordering. We then had to wait until P&M was launched, with the

supplier asking us multiple times when we would have the order sent to them. I had to wait a few days before I could start ordering the microscope. The procurement staff asked me to come to Chambers street in person to their office to put the order through. I went and they could not log in to the ordering system. I waited for 45 minutes, while they were telling me users of P&M were clueless and did not know how to read manuals. In the end, I left. The next day, we had a team call, we managed to log in and try to raise the order. There multiple issues and after 1hour on teams, the procurement team still did not know what to do. After that, I had email and team call exchange almost every day for 2 weeks to order this microscope (Value >£600K). The supplier also emailed me and the COIL facility manager every day asking us when the order would be ready, otherwise they would ship the microscope to someone else. The order went three or four times to the head of ICB, SBS and CSE and then procurement, would tell us there was a problem and I had to put the order in again. It was a massive loss of working time for weeks. The rest of my time in September was wasted on trying to book travel on Diversity travel. Just like P&M, diversity travel was imposed on all of us and is charging a fortune for a lack of service and wasting our time again. This is also damaging the reputation of the university. No one wants to take responsibility for all these implementations that treat us like slaves.

I would like some timescales as to when the new P&M system will be functioning correctly and the users given full training, rather than grabbling around trying to work out how to complete a task. time consuming and unnecesary.

The new P&M system has made it impossible to do my job. I am unable to report in project finances to funders and PIs. The information that is in P&M is mostly incorrect.

The letter rightly mentions the disproportionate cost of P&M on neurodivergent staff. But all staff need focus and energy and large uninterrupted blocks of time to do the most important bits of their job. The P&M system has been designed to need people in the loop, and frequently, for it to work in many areas. It consumes time and attention and energy, and this does not make sense for users whose main role is not finance based. Why hire a professor for their research expertise and then have them approve purchases for post it notes? I am deeply concerned that fixes to people and money will stop once the errors in the implementation are fixed. But we cannot not stop there. The conception of how the system works and what it's for needs to be fixed, too. P&M has made processes that were invisible to research and academic staff something we now have to care about. That care needs time and attention, which as a result has been displaced from work that many staff are better at and that forms the core of our mission. The way P&M is intended to works makes as little sense as asking academic staff to make the sandwiches for Edinburgh First catering they've ordered for an event, or finance staff to repair broken doors, or the principal to hoover his office. It's a 'business-driven' project that hasn't paid any attention to what our business actually is. Please, please, please, make the meta-work invisible to us again. (The fact that so much of this work was previously invisible is a huge complement to the professional staff who did it. Those colleagues are immensely valuable. They want to use their financial expertise, not be a support helpline for non financial staff). Researchers and teaching staff in the university do not need, or want to think about financial transaction approvals, or marking purchases as delivered. We should start again, from scratch, if we need to. In the long run, getting this right will cost the institution much less than a system which lives on as a built-in distraction and hindrance from our core mission.

Unable to pay research assistants for work already completed. Ongoing field research attached to my PhD thesis has been completely stalled until funding issues are resolved. This has a crippling effect on my professional reputation amongst other researchers and host communities. There are also real consequences for my research assistants who forewent other means of income in order to work for me.

We are still not able to by materials and supplies, which is now impacting on student and staff experience

I wasn't able to order anything for months at the end of the PhD. These key months meant I could not finish my experiments.

I've experienced several of the issues raised in the letter in my work and feel they have damaged my own professional relationships as well as the University's relationship with external partners and suppliers.

I am struggling with the research consumables and materials (that has delayed my research tasks), expenses reimbursement and payroll. SciQuest and E-expenses were super easy. I am sorry, I am giving up this new P&M system.

Many problems - stress for lab staff, unable to order essential reagents for the lab, dealing with large numbers of incomprehensible emails.

A recognition that the roll out and long term support of a system like P&M needs a large increase in professionally trained financial and administrative staff. Self service is not fit for purpose for academia

It's probably been noted, but the online expense claims form is incredibly poorly designed, full of bugs, and not fit for purpose. It easily doubles the time it used to take for submitting a claim, while also being incredibly error prone, which is an unnecessary waste of staff resource.

I can foresee having to advance substantial funds to PhD students in their final year of study from my own savings just to enable them to complete their studies on time. These are students on scholarships that have tight oversight.

I have peers who are not being correctly paid their full stipend: in some cases I believe they are not being paid at all. It goes without saying that this is unacceptable under ordinary circumstances, but with the current economic climate and propery market in the city I cannot undestand why the university has not stepped in immediately and offered temporary relief.

First the downtime without any ordering was extremely disruptive, as we had a manuscript revision due in and no way to order in necessary consumables. Second, the ongoing issues with reimbursement and salary payments not coming through put a high financial strain on trainees and is unacceptable. The old system should have been kept in place until it was clear that P&M was a viable option for finance.

simply not fit for purpose.

Sales Invoices have also raised major issues - we were not able to raise sales invoices for a number of months (this was delayed and not available when P&M became live), and when the application did become available there are major issues with it and feel it isn't fit for purpose. We have not been able to bring in income to the University and again have caused issues for partners who have been at the end of their financial year etc. and unable to pay us as we have not been able to provide an invoice for them. Like the other issues this has taken much of our time away from BAU and causing a negative impact to relationships and reputation.

Not paid back for conference fees after 2 months.

Important planning of staffing research strategies in our School is being delayed by many months because fire-fighting to deal with P&M problems is taking up all of valuable senior finance officers' time.

The Projects module is clearly not fit for purpose. A few examples (there are so many) are: (a) No one has yet been able to explain to me why the PI is set up automatically as the Project Manager when we have Research Managers employed for this purpose. We have been told not to change this in the list of roles, but given no reason for this in terms of any wider rationale. (b) No one has been able to explain why expense payments are routed to the line manager rather than the budget holder. As many staff in Universities work on a range of projects, the line manager approval process means that the approval could be given inappropriately. (c) When an expense approval is requested, there is no way to find out what grant has been charged, again leading to a lack of transparency and accountability in grant management.

Dear Senate Members, Thank you very much for taking the time and effort to assemble an excellent letter to the Principal and to Court regarding the disastrous introduction of People & Money. The letter clearly sets out the many ways in which P&M has a disastrous impact on staff and students across the university. I believe the suggested actions set out in the letter are appropriate and I suggest further you indicate that these should be taken with the greatest urgency. Given the downward spiral we currently find ourselves in, I recently discussed with colleagues an initiative to call for the immediate resignation of the Principal and other

responsible parties, including the P&M Enactment Group. Given that your letter precedes our initiative, I am very happy to support and sign it. However, I would suggest that you consider stronger language at the end of letter (preferably in bold font). I believe it should indicate that if senior leadership fails to urgently act on the actions set out in the letter, it will be a clear sign of incompetent governance and Senate would see no other option but to call for the immediate resignation of the Principal and other responsible members of the Senior Leadership Team. While to some this may seem as the 'nuclear' option, it may well become the only way to instate a team with the competency to solve the crisis we face and to restore some form of trust in university leadership amongst staff and students. I hope you will consider the above suggestions to what is already an excellent letter. I thank you once again for your time and efforts, which are much appreciated.

Thank you for leading on this important issue, members of Senate

Financial budgeting is not possible as we have no WebFirst equivalent. I lost 40 cost centres - replaced with 2 - and no subdivision of these to allow monitoring expenditure on individual courses I am responsible for. We shall try and maintain a "shadow" system on a spreadsheet to unpick this later but it is not efficient.

This has adversely affected public engagement and widening participation events due to blocks from companies we use to buy supplies and the delay in expenses resulting in students and staff waiting long periods to reclaim expenses associated with these events.

As a member of the Informatics Teaching Organisation Exams Team and Course Administrator the issues with suppliers of required resources such as stationery and equipment is critical. The issues with ESC in terms of response timescales/decision making outcomes e.t.c. also impact my role. The issues with the appointment of Student Advisers regarding administration workload and no experience or expertise in Academic related issues is also an issue.

We support international students on full and partial scholarships - significant delays in them receiving financial payments is having a huge impact on their economic and psychological wellbeing. My team have been forced to issue payments to students from their own personal funds to ensure our students are not in financial peril. The administrative burden and stress P and M has put on our team has inhibited us to be able to deliver other vital support and services to our scholar community, which is impacting our team's wellbeing as well as eroding the trust between our students and the university. I do want to note that I am grateful for the financial services staff who are doing their best to advise and support in extremely challenging circumstances.

I am considering paying PhD students who attended my RSE funded workshop out of my own pocket as it is not even able to estimate when she can receive reimbursement. Not to mention the many hours/days it cost me to arrange practicalities of the workshop within the P&M turmoil.

I'm one of the 65 - 70 FTE who have left their Finance Business Partnering posts since mid-October to help with recovery efforts in the central finance teams. I'm sceptical that our support will not be required after the agreed one month term, given the insufficient progress updates on whether our efforts are yielding the expected results. Moreover, I've had a glimpse into what our central finance colleagues have been dealing with all these months: the frustration with the system's functionality, the system's failures, the interim processes, the masses of manual workarounds, the mounting HelpDesk calls and the lack of resource. This is exactly the same experience as Academics & Professional Services front-line P&M users. Whichever perspective, at the moment, when one problem is fixed it gives rise to several others. There is not enough resource across the board to deal with all the issues in a timely manner for it not to affect business continuity. This includes the P&M Programme Leads who are stretched too thin. My question is, will an independent company specializing in crisis recovery be consulted? Maybe they can also provide provisions of dedicated in-house support/personnel in the short/medium term whist the systems issues are resolved and embed? For example, a company like, Inverroy Crisis Management Consultants.

Delayed stipend payment, difficulties claiming expenses, limited access to pay slips.

Mental and physical health of staff as well as students deeply affected. Many leaving their jobs due to strain of P&M. Hard to recruit people to rolls if they know P&M will be a large proportion of the work, Strain then falls on remaining staff.

While others have had more substantial impacts from this problem, it look about 5 months for me to receive expenses from my school of a not insignificant amount - which stretched my finances, and forced me to borrow money in the meantime. Others will still be waiting, and for more substantial amounts, and I can only imagine the stress they must be experiencing.

I am unable to fulfil 60% of my role due to not being able to access reports, reports provided are insufficient and internal recharging still not available. And general limits on what I can view.

Expenses claim of over £400 submitted 9th September, not received as of 7th November.

Totally inadequate training, guidance and support. A finance system that is not intuitive or user-centric and is full of glitches, all of which has caused unnecessary stress

Our work with schools is being limited by our ability to pay our contractors and students. It has become embarrassing to deal with external organisations and contractors who have been unpaid since June.

This system makes the most menial tasks take hours and leaves the educated feeling uneducated with no common sense categories and a lot of guess work. It's time consuming, not user friendly and an embarrassment to the university. Taking over 2 months to implement a system with serious flaws it should be withdrawn and sciquest re-instated for the foreseeable future.

Joined the university for 2 months as an administrator, still impossible to gain access to the system. Can't view reports, create invoice, PO... Can't imagine the amount of backlogs and workloads waiting for me.

Still missing re-funds from Conference costs

This new system is creating unsustainable work load at all levels of the University. Weeks go by waiting for orders and research has slowed to levels comparable to the covid 19 pandemic. Research output is affected and as always ECRs and post docs will be the most affective. The University will become less competitive if this continues and staff will leave.

It has been a massive weight on our time at EUSA to respond to all the queries that have come through - and they are always very upsetting to read. Even professional and academic staff are contacting me asking for support with this issue that is purely the responsibility of the senior finance and HR staff. I plead that senior leadership use their influence, and budget, to remedy this and compensate students and staff who have been put out and out under stressful working conditions to support students who have not been payed what they are owed.

I am yet to find one function within PAM that is fit for purpose or works correctly. The entire roll out has been a shambles and is embarrassing for an institution of the size and influence of the University of Edinburgh.

The transfer to the new system has been horrendous. It has had a devastating effect on my ability to conduct research; struggling to use procurement and the problems caused by incomplete/unpaid orders is mentally draining and consumes the majority of what precious time I have to get in to the lab and conduct research. Pilot funds I have been awarded cannot be released due to glitches in the system - this is having a direct effect on teaching as I am unable to purchase key reagents required to grow cells and generate samples for my Honours student (staring in early Jan 2023). The knock on effect to the student, and the success of their lab based project is huge. The stress and anxiety caused by this system, the lack of effective management and communications is having a colossal effect on our campus Professional services staff who are trying to firefight this; their palpable stress is shocking and extremely worrying.

I have been waiting for months, for my expenses claim to be paid/refunded but it is stuck in P&M waiting for 8 people approval (including the head of school!). Why is the system asking so many people to approve one single standard expenses claim?

long delays in contracts for PhD tutors (up to 2.5 months from appointment to contract in hand) for 10 GH posts

My role is an Information Analyst, there is no or very limited options to perform an adequate reporting function, the data is not even accurate or up-to-date I spending more time to filter the discrepancies to help generate a report our department is able to partially use/apply.   At the initial talks around the implementation of P&M, we were promised flexibility to build our Oracle reports and there was also talk of a new storage landscape: a DataMart/Dataflow, none of which has materialized in the new system.

main problem with the purchase of consumables (many unclear boxes to fill out and confusing categories for the goods order in purchase requisition), ong lags on requisition online form (especially category 'Labs and MedVet', no anymore 'quick' purchase opportunity from the stores, lots of email spams about requisition progress, difficulties with outgoing DHL service, no working helpline

PhD student, as of yet unable to access P&M and therefore cannot claim expenses (and haven't been able to since July). HR were unable to tell me when I would be able to get access.

The deficiencies of P&M is affecting the morale of our professional services staff and is taking up so much of their time that we can no longer be proactive but are mainly reactive. Many of them feel they can no longer do their jobs in an adequate manner which leads to a high level of frustration. I am concerned that colleagues on significant grants might leave the University as managing big grants is become too difficult.

As a line manager within a large team I did not receive any training on P&M, neither did anyone else in my team. The expectation that staff would be able to simply adapt to a complex new system without any training was completely unreasonable. This had a huge impact on me and my team in terms of our ability to manage HR functions (not a core part of our roles but we suddenly had to take on this extra work with no training or support). An SDA role has now been established within the business area, but there is still a lack of understanding for staff on how the system works and who does what. The Finance issues have impacted our staff, our applicants, our students and our suppliers and has had a huge impact on staff well being.

I have been awaiting expenses being paid for over 2 months now.

The fundamental issues go beyond P&M. Centrally driven changes have happened without sufficient knowledge of on the ground working i.e. systems have been put in place that fit the perception of how central management think things work, but not understanding how the University as a complex organisation actually functions and the needs of the end-users.   The central 'shared services' model is also not working for the university. Emails being sent to 'anonymous' operation addresses, do not promote collaborative working and sharing responsibility for finding solutions. For instance at the moment after 18 months of a vacant post, I finally have recruited a postdoc in a highly internationally competitive environment, but have run into significant issues with visas. However, can only engage via email for advice with HR ops. We've lost sight that interpersonal relationships within the university help problem solve by harnessing skills and in built institutional knowledge. There are a lot of dedicated and talented people in the university and together we can find solutions - it is there and available if leadership engages with it.

I have patients waiting months for their travel expenses to be reimbursed. I receive regular calls from a supplier who has not been paid since before the shut-down and refuses to provide anything further until their invoice is paid. We have also had Bailif's letters arrive. The P&M system is not intuitive and so I spend a lot of time trying to figure out how to do things and don't like to constantly disturb other people. I'm also concerned that I may not have always processed things correctly.

P&M has been causing issues for over 2 years. Not just in finance but with all HR processes before that transition. Its implementation has impacted heavily on my workload and that of my colleagues. I have never encountered such a clunky and non-intuitive system in all my working life. It is not fit for purpose in terms of bulk recruitment (ambassadors etc) and therefore the already time-consuming processes need to be applied for every new offer/contract even if the only difference these have is the end date. This system has made me hate my job.

Agree with the content of the letter. This has had a major impact on my groups ability to perform research and is likely to have significant impacts on our progress going forward.

We have lost £40000+ of research grant money that could have been spent had we been able to produce reporting on our project budgets in a timely fashion. We still cannot sensibly check spending or forecast future spending because of the failures of P&M

collaborators and partners have not been paid for over 4 months for their research work.

Due to breaching agreements for late payment there may be additional financial penalties/costs which the University may incur.

Allow PG students to easily reclaim money they have spent on university related business without us having to miss hundreds of pounds (sometimes more) for weeks on end. It used to be very easy and fast before, now there is very lengthy paperwork and we need to pass the email around a few people for days before even sending it to finance for approval. Additionally, I couldn't run multiple experiments due to lack of equipment (such as different sized cell culture well plates) which continues to put my project behind and cause delays.

Since the introduction of P&M 1st of September placing of order have been very difficult. It is taking longer to place order. Getting P.O. generating by the Buyer to approve an order can take 7 -10 days. The buyer is forced to work until 9-10 pm to get the job. This is unfair. We recently had a situation where BOC put our account on hold due to invoicing that hadn't been paid (£57,000). We are a busy stem cell lab and have 12 incubators full of stem cell that are reliant on CO_2 maintain the atmospheric condition for the cells to grown. Thankfully for this was resolved, but it was close to failing as the Chancelors building only had CO_2 gas cylinders for 7 days.

Managers are stressed to the max and important research is being delayed.

The new system is pushing a huge burden of extra work using a impenetrable system and as has been stated is massively impacting our ability to do research in particular. How can this system not have been tested prior to imposing it on staff? It is sadly symptomatic of a more chronic problem of management changes to suit administrators but that just makes doing research harder and harder adding to the admin work load of academic staff.

Ordering has been very complicated and time consuming affecting both research and teaching provision. I line manage all the teaching technical staff in the preclinical teaching provision in the vet school and the extra time ordering now takes is unbelievable. Also -the structure that follows HR rather than ordering lines does not work. I don't approve the teaching budget, but I get ALL the approvals directed to me. I also line manage the admission team, and one of my managers are off on maternity leave. There complicated paths we have to follow in order to assign the ordering and management lines within P&M is unacceptable. Maternity leave is something that we deal with all the time and there should be a straight forward way of dealing with common things like this!

Utter feeling of helplessness. Schoolboy errors in system (was it not checked beforehand?) POs not being created, Sales Invoices not being communicated that they are done, No reporting of any kind, constant email from companies chasing payment, major back-log. Why wasn't functionality checked with old system - very least it had to match and then improve etc.

The letter perfectly represents the situation with P&M and highlights the incomprehensible decision purchase and roll this out across the University. Why was there no pilot scheme or parallel run of P&M initiated? Why is there no "user-friendly" interface on P&M - without a finance background we just complete boxes without understanding the language used or implications of our responses.

Not sure if this is directly related to P&M, but I have not yet received the UKRI-matched increase in my PGR stipent as promised by the school (R(D)SVS) as opposed to all my PhD peers and I have not received any information on reasoning or when/if I can expect it at all in the next months.

This is affecting me for my Germany trip

I am very disappointed that after huge amount of resources been dedicated to P&M portal, it doesn't provide the service and the structure initially aimed for finances at the University. This is a critical issue in terms of the management of grants, hiring, etc. which should be made rapid and feasible.

It has been a hustle to get things orders and expenses reimbursed.

I can't suggest very much on top of what already has been said in the letter

The training has been woeful, the issues were totally foreseeable, the system does less than we could before and we are at the front line of dealing with payments (or lack of) which has been extremely stressful and time consuming. The Principal needs to be seen to be believed, where is he?

An excellent letter. My expenses have still not been paid after months of waiting. This caused quite a bit of stress before I went on fieldwork as I had to buy a lot of equipment in advance without getting reimbursed, and I had to borrow money and get a credit card. As a PhD student, it is difficult to support paying large costs in advance. On returning from fieldwork, I found that other student's stipends have been paid into my bank account (I'm unsure if any of my own expenses are included somewhere in these payments). I am trying to get this sorted with the university finance team, but they are inundated at the moment due to People and Money issues. I don't think centralisation of systems works. It creates a single point of failure. This time it has been due to systems implementation failures and lack of foresight, but in the future, it could be a cyber-attack. I'd like to see the system reverted to a decentralised one, with each school using its own expert knowledge to deal proficiently with the finance issues/requests that they previously dealt well with. Edinburgh University has an over £1 billion fund for emergency situations. This is the time to dip into it.

The implementation of P&M system has been horrendous. In any business non-university setting, the responsible individuals, who decided that it should be implemented while not being ready, or with overlap of the older system, would be fired

Have not been affected directly as I have just started my PhD, but I have had almost everyone around me say that it has affected them

Clarity on escalations of purchase order requests and SLAs/KPIs that are currently being worked to.

Too many fields and no intuitive way of knowing whats relevant for a given user.

P&M is having a detrimental effect on my work everyday. I am in a busy clinical role and now have to spend at least 70% of my working day having to sort out problems and ordering issues. Many of my suppliers have put orders on hold because of the delays with payments, this means were are going without urgent clinical supplies. Recently all our external labs are now requesting PO for each sample submitted. We post out tens of samples every week throughout the hospital, so is taking a lot of time and results in massive delays with results for hospital patients.

I have found my admin workload has increased dramatically ,which has taken me away from my clinical work and put extra pressure on my team. The lack of stock has caused me stress and made me feel as though I am failing to do my job of procuring supplies.

Some requisitions I make do not appear on approver side. Some PO's marked as raised were never received by suppliers. Orders marked as "emergency" aren't processed for long periods of time.

P&M is not fit to function. I had a company threaten to boycott the University of Edinburgh over email due to funds which hadn't been paid since May. Furthermore, I've heard numerous reports of students not being paid on time, or not being paid at all. Completely inexcusable for a top university.

Unable to transfer grant money to Malawi to pay researchers

I am 3 weeks away from handing in my PhD but I still owe £5000 to an individual based at another institution in Iceland for work they completed for me in the summer. The P&M system is holding up this payment and causing a great deal of stress and anxiety in an already very busy final few weeks of writing up. It is totally

unacceptable that payments like this are not being processed. It is hugely embarrassing having to keep telling the person you owe the money to that you don't know when they will be paid. The university is going to lose so much business with suppliers and collaborators that will not work with us any more for fear they won't be paid. Everyone who I have delt with in the finance department have been brilliant - they are so over worked by the implementation of the P&M system. A very poor end to my PhD and my time at the University in Edinburgh (9 years in total).

P&M has drastically complicated and delayed my research due to inability/delays of ordering, not being able to order things myself as a PhD student with independent funding.

Many of the issues raised in the letter have affected our work.

People and Money is not compatible with PPMS a platform CMVM uses to recharge users for access to small research faclities. SRF's staff salaries are paid from the monies recharge so the prolonged incompatibility is not acceptable

Some of the firms we use regularly have put a 'hold' on our accounts, Banners is one of them.

Salary not paid in time

I've just been awarded a NERC Urgency grant to deploy equipment on an active volcano in Ecuador. The P&M crisis seriously jeopardizes this work, and the agreements made with the funder. Otherwise superb professional services staff have been left entirely helpless in supporting these activities, and their roles utterly undermined. It's a debacle.

Issues I have experienced are reflected in this email (significant delays for payments to researchers on my ESRC project based in Africa, causing very serious detriment to their day to day lives as this was their full time work for months, destroying trust built over years, especially as no adequate timeline could be given about when payments would be made)

Until August, I was a PS frontline finance user and there were issues/concerned raised by finance staff about the impending PaM roll-out. In the months leading to the changes, a number of processes and payments were already being affected (missing and delayed payments, errors to codes, invoices missed). During some of the training workshops (notably on expenses) a number of PS raised concern that the incoming system would increase errors and delays but these concerns were dismissed. The training I felt was insuffient and did not actually show what the system would do or how it would operate. It merely outlined the expected process but no procedure. I felt this did not leave time for staff to be adequately trained to deal with the inevitable backlog.

Absolute disaster from launch day

letter adequately lists P&M issues

Please pay our vendors on time

I have had to visit a food bank for the first time in my life because the University has not paid me back for research expenses. Not being refunded for research expenses and not knowing whether I would be paid my stipend at the end of the month has caused me a lot of undue stress (i.e. not knowing if I will be able to pay my rent on time). Furthermore, as a trans person, I have been holding off on changing my name on my student record as well as on other official documents out of fear that any change in the system will lead to me not being paid my stipend at the end of the month.

I still do not have access to requisitions despite multiple service requests. This has placed unnecessary constraints on my work and has slowed progress on important papers.

I run a scientific core facility providing advanced analytical services to researchers, and the new P&M has crippled our activities, not able to procure some consumables at all; other requisitions still being rejected by ' the Buyer', without any explanations. You may not believe, I have no right to order a consumable which is

need in our laboratory on first floor of the building, although its available in plenty in our institute Stores on the ground floor and the research activity is suspended for weeks now!

P&M has adversely affected close friends and colleagues who have either had to be on the front line of receiving abuse from a failed finance system, not been paid in months. I have also been unable to claim expenses since July 2022.

These delays in payments are seriously damaging our relationships with external suppliers irreparably. This will have a knock-on effect on the quality of services and standard of project delivery the University provides. If we cannot be reliable and pay people on time and within contract terms then we cannot expect the same from suppliers.

We have had to ask for external collaborators to buy supplies and services for us in order to move forward with collaborative research projects, with the promise that we will eventually be able to pay them back.

Projects with communities in the Global South with major delays. Making the funds available only 8 weeks AFTER the end of the project. It has caused terrible holes in my personal finances.

not being able authorise and procure items from suppliers within and outside the UK

Unable to perform my job now for 2 months as I do not have access to the projects module

The freelance transcriber for my funded project has not been paid since July. This jeopardises our working relationship into the future, and does nothing to enhance the reputation of the University.

I had to cancel my place at a conference, where I was due to present a poster. The organiser kindly waited until the launch of P&M so that I could pay for my ticket - however, as the crisis unfolded, I realised I would not get reimbursed quick enough. I simply couldn't afford to spend hundreds of pounds on the ticket out of my own pocket and quitting last minute made me look really unprofessional. I felt embarrassed explaining that I couldn't afford it and will probably not be accepted to this conference again. PhD students shouldn't have to choose between doing our work or paying our rent.

I manage a DTP and rely on P&M for a variety of programme necessities: award of salaried UGR and PGR students, external training providers and services, reimbursement of student reps for DTP work, training fees payment, not to mention payment of UKRI-funded PGR students. There have been uncertainties about the new processes to deliver on key components of our programme across the board affecting the majority of all DTP operations.

I was asked with no notice to pay over £200 out of my own pocket because we had only 2 approved suppliers for a catered event: one will no longer trade with us because we are a 'bad debtor' and the other needed 4 weeks to raise and have approved a p/o. I've now been given 5 different codes to try and get my money back. No luck and hours of time down the drain.

Several members of our group have been adversely affected by this, students unable to claim expenses and new starts unable to procure IT equipment.

I took up my new position at the Roslin Institute on 1st August 2022. My first task would be to set up a brand new electron microscopy facility. To do this, plenty of new consumables were necessary and the order of these was (and still is) substantially delayed. Equally, setting up a charging structure for the facility was delayed as finance staff were having to deal with other P&M issues. The result of both of these issues has meant that I have a waiting list of people wanting to use the facility and pay for our services, but they are having to wait. It is very hard to explain to them that the reason we are not ready is that we can't order what we need or set up charges as we would like. I am at risk of losing the trust of my collaborators (particularly the ones from overseas) if these delays continue.

Stores is barely usable, wrong pricing, item coding, UOM errors meaning stores is barely fit for purpose and is causing delay to many users meaning lost time for research/experiments

Tasks take longer to do, to the extent that I sometimes struggle to do non-P&M related tasks which are also in my job description. It is stressful to be on the frontline when people get in touch because they haven't got paid, or documentation they need or expect (e.g. contacts) is late or missing, as I feel unable to help them, all I can do is raise Service Requests.

I worry about the university employees working in finance and purchasing. They are not able to carry out their work and are being held responsible for the failings of P&M..

Beyond the very challenging and failed transitional period, my concern extends into the time when we've all move passed it and are left with the 'new system'. The new processes and tools created to bring about improvement did not make things less complicated and automated, but clunkier and requiring people to invest time to become experts, consulting with too many forms and websites to get what one needs. I'm concerned about this approach because it seems to be favoring a culture where there is a lack of support from area experts. Not to mention, there was no visible increase in human resources at central level (much less adequate training before roll-out, but that's been noted in the open letter). As someone who has worked across various departments, I understand the value in creating a more uniform set or processes and I'm generally not against centralization as I've seen it work elsewhere, but this is centralization at its worst, I'm afraid.

Delayed reimbursement of dissertation expenses submitted 3 months ago

P&M has severely impacted our ability to provide the same level of service to our staff, has severely impacted our relationship with suppliers and has placed staff under great stress dealing with a system clearly not suitable for its purpose.

When I first took up my current position I was unable to order anything for my lab group as no new starts were being added to SciQuest or eStores due to the upcoming P&M roll-out. Once P&M became active, I then became the only one in my lab group capable of ordering anything as my PI could not access the Procurement tab in P&M and our other post-doctoral researcher couldn't order from our group's codes because she hadn't changed lab group yet. Despite now working full-time in our lab, she still cannot order items through P&M. The training videos for P&M were not particularly helpful as they were not geared towards buying laboratory supplies. A colleague ended up making a video that explained the ordering process far better than the official training. The interface of the Procurement app is not user friendly. Products cannot be searched for by their product codes and searching for items via a text description often does not return the desired products, either because the search term is too specific or not specific enough. When I first ordered an item, I was unable to change my delivery address to the correct address, resulting in a barrage of e-mails over the next few weeks telling me to receipt the order, even though it had not arrived. Similarly, when I have generated Purchase Order (PO) numbers for certain services, I receive e-mails telling me to receipt the order despite the service not being carried out yet. When ordering something from internal stores, identical items from other stores departments from across the university show up. There is also no way to know who is supplying a product without clicking on it. Once this has been done, you cannot press the back button in your web browser without being taken back to the main menu. P&M can only generate PO numbers for fixed prices, posing a problem when hiring a contractor who's final cost would depend on the time they took to carry out the service. When at the checkout with an order, buyers are expected to know whether the items they are buying are VAT exempt and attach a certificate for each one individually. After generating an order manually for something that I couldn't find in the catalogue, there was a notification at the checkout saying that a field was incomplete. Clicking on this resulted in being trapped in an infinite loop of notifications, which could only be avoided by going back to the main menu. The suspension of the university's account by DHL has held up the progress of one of our group's projects by a number of weeks and resulted in our post-doctoral researcher wasting time in order to secure an alternative method of transporting samples. P&M should have rolled the functionality of Sciquest and eStores together under one easily accessible application, but instead it can only be described as an omnishambles. Why this was implemented without a phased introduction, with the safety net of the old systems, and no proper training until it was live is anyone's guess. Ordering used to be simple, but now takes at least twice as long. I have even heard that people are not ordering as much as they used to so that they don't have to go through the rigmarole of using P&M.

Please don't put PS for Professional Services. Is it worth noting - maybe i missed it - that two years into P&M HR, all the home-madeo work-arounds are business as usual and nothing is getting quicker to do. Finance teams have been offered staff to cover the issues, HR from the first wave need to follow the usual annual approvment process and justify the extra workload (and potetially feel we are just not stepping up and coping afte two years). When do 'they' plan to address all the 'continual improvement' SRs for HR now than part 3 has done so much damage?

We are very much missing Insight as a supplier, more of a procurement issue than P&M but it was there before the change and it's not now so it still counts. There is no easy way to 'find' the punchouts. There used to be a menu page where you could see all the available suppliers and click on the links but now you have to use the Search and use the exact name (ie HP and not Hewlett or Packard). Non-standard quote done in the HP punchout are not carried through so a saved quote needs to be sent as an attachment along with the order (sorry request) so that procurement can order it from scratch. I have delegated permission from my line manager so that I can approve Annual Leave for my team. This however carries across into the finance part so that when I place an 'order' it passes by my line manager and comes back to me to authorise - the one thing I thought we wouldn't be able to do i this new system. I even got an unconnected colleagues expense claim to authorise last week because his line manager had given delegate permissions to my line manager while she was on AL and that of course then got delegated to me. I have not and will not authorise any of these things other than the AL requests as that's what I have been tasked to do, but the permissions should be separate. Orders from Banner have been on hold due to non-payment of invoices, practically this means that although I ordered some parcel tape in mid-sept, I'm still waiting on it. We literally can't proceed with Business as Usual because we don't have any parcel tape, unless I go to a shop and buy some myself! We receive new laptops, install them and then box them back up for sending them out. Such a simple thing but an example of being held up.

I logged a request for a cash advance from my research grant in July for 180 pounds to pay my participants. My participants are a hard to reach group of children and young people and the sigificant delay in them receiving their gift vouchers for participation my deter them from participatingin research with us in the future. This is unacceptable.

As a Laboratory Manager of a busy diagnostic laboratory I am now having to spend much more time doing HR and accounting jobs as opposed to the laboratory work I was employed to do.

Suppliers not being paid has meant services have been cut off leading to a significant loss of professional reputation in our area

I am signing this form in support of my colleagues and other PG students which have seriously been effected by this issue.

Delayed procurement of student laptop. Currently in the second month of my PhD and a laptop is yet to be procured.

The removal of the ability to claim expenses online is very frustrating and onerous. The lack of clarity and information about the alternative process hasn't helped. I delayed a visa application until after the new P&M system was designed to be up and running but had to privately arrange to courier my passport to and from the overseas embassy because the system was still not working. The impact on supplies is devastating to my PhD. We've already had major impacts from Covid and Brexit, which have made some lab plastics unobtainable for periods. It is incredibly disappointing to have further lack of supplies and delays due to the inept changeover to a new system.

P&M has caused huge interruptions and chaos to our work and research. Expenses not paid. Supplier invoices remain unpaid, and I am being hassled by the suppliers as finance are ignoring both the supplier and myself.

Not acceptable students and staff not getting paid. Also, companies that supply us materials and drugs that compromise the welfare of our patients.

Over the last year working for the university, I have experienced 2 missed paychecks that were not my fault, as well as miscalculation of AL entitlement through P&M . Academic staff are also generally unsure how to access their own P&M codes, this means that as a receptionist I experience problems booking catering and ordering taxis as I cannot fulfill these tasks without the correct codes. Then what normally happens is that this frustration is taken out on myself and colleagues verbally. It is extremely frustrating and demoralizing to experience these challenges on a daily basis.

Is having direct affects on the clinical service we are providing and our reputation with clients and suppliers. For instance staff are having to pay for fuel in university vehicles as fuel cards are regularly not being cleared by P&M. We also cannot reliable supply pharmaceuticals to clients for their animals which is damaging client relationships and potentially affecting animal health and welfare.

I have been personally affected by the P&M problems, suffering financial problems due to a delay in being reimbursed for fieldwork and event organisation.

Students not being able to afford groceries due to delays in stipend payments all during a cost of living crisis is atrocious. The response of 'we are sorry, please let us know if it has affected you' reinforces class disparity issues, where wealthy students have not been affected while students with no further family support have to temporarily disrupt their studies to seek other forms of short term employment to survive.

Card payment machines were not working due to wi-fi going down which meant a deposit I paid for the university's childcare setting wasn't returned for days. The staff did their best but they were clearly working in a dysfunctional environment and deeply frustrated. In addition, money I'm due for a RDF has still not been paid several weeks after I submitted the claim.

At the end of September, I was paid my quarterly PhD stipend, but at last year's rate rather than the new one to reflect the stipend increase for all funded PGRs at the University (£2875 instead of £4415), meaning I'm owed £1540 for this quarter. I've been in touch and have been assured it will be paid, but no date given.

Concerned about the ongoing issues with PAM. In current role affecting inability to procure any school supplies but on a personal level concerned that there have been delays in colleagues' payments and businesses not being paid for goods/services.

Problems with getting expenses reimbursed in a timely manner; payment of staff in the unit; ordering things.

The financial aspects of PAM money have been disruptive to research, but the human collateral of the PAM roll-out is far worse. We as an institution have allowed some of our most lowly paid and financially vulnerable members to become victim to an administrative roll out. The university has failed in its duty of care to these students and put financial granularity ahead of people.

Not able to use my grants and great delay in ordering things

As Head of Section and Co-Head of Section (SPLAS, DELC, LLC) I've had to deal with quite a lot of issues with P&M, mainly around issues of recruitment, completely unacceptable communications that the system sends out to accepted/rejected candidates, and inadequate functioning and recording of the leave system for colleagues.

inaccurate prices, no updates on stocks in stores, spending lots of time (too much) contacting different companies to find consumables in stock and where the University account has not been blocked due to unpaid bills.

I've had to postpone and cancel practical lab classes for undergraduates due to ordering issues. Massive delays in recieving goods, items being delivered to completely different departments and not being stored correctly and now items being delivered long after I needed them. The new system should have been rolled out on a school-by-school basis at the very least, and significantly more training should have been offered. The fact that the old ordering system was taken down for an entire month before P&M's implementation was baffling.

Simply put, the new system has been an unmitigated disaster at every level. The new P&M system has had a worse rollout than the 1940s.

I have not received my stipend on time on two occasions, so that's why I decided to take a part time job - and have some stable income that would help me pay rent. They have in the end sent me back the money, but it's been such a hassle sending emails to lots of people in the department, when I could have just been doing research.

Difficult to navigate. Orders which were placed and received within days are now taking so much longer.

The system has caused failures in the care for our patients by ordering issues and now with companies cutting us off as they are not being paid.

It took 3 weeks for me to even be 'granted' a licence to use the 'Procurement' tab even though I have been in charge of ordering from multiple grants for 15 years. I am still yet to be able to GRN any of my migrated orders leaving all the companies unpaid, one who is about to call in the debt collectors as they are only a small company. All historical data on orders/grants have vanished, we cannot see where our orders are, whether they've been sent, received or paid for. There is nobody to actually ask or speak to, as research staff and end users of P&M we don't receive any of the 'communications' or 'updates'. Questions go unanswered. I just cannot believe such a porrly managed and implemented system was allowed to close the university finance system for 6 weeks and then be launched with such an ill prepared system and ill prepared staff. and the user guides?? Oh lord. What were they thinking? Our orders used to be 24-48hrs..... now they are weeks, and we have no way of finding out where they are or even if the company has received the order. The staff available to help seem to be doing their best but they have no knowledge of the workings of the end users so just talk in finance language.

I am concerned with how long it's taken to acknowledge to staff the extent of the problems when it should have been clear early on. The reputational damage and impact on staff particularly those working directly on the problem is a considerable concern

The lack of honesty/transparency in the comms about P&M is gutting to read in the media- these false narratives need to stop immediately. There is no way a PR 'damage control' spin session can put something so shambolic back on track. Honesty and ownership of this omnishambles of a venture by senior management is necessary and urgently required. The lack of moral thread across multiple layers of this scenario make me question integrity of leadership.

The biggest negative impact was that I was (and still am) unable to pay local research staff, which puts a strain on my professional relationship and reputation as a serious and considerate researcher in conflict-affected countries.

I fully support the issues outlined in the letter and it is important to set out the full extent of both the stress to staff/students/suppliers and damage to the reputation and good standing of the University that the past few months has caused. It is inconceivable that this situation has been allowed to continue for so long in such a large institution providing critical and important services across so many areas of business and employing so many people..

P&M has not only significantly disrupted research, but for international staff, has had severe personal and financial implications (inability to process visa applications, reimbursement for thousands of pounds worth of fees paid).

DVetMed students still don't have access to P&M, no way to access their payslips or expenses, and have been paid incorrectly on multiple occasions

I have not been able to find out how much money is in either of my research grant accounts. That has delayed being able to appoint a research assistant.

Difficulties with getting supplies have led to cancellations of operations due to a lack of consumables and unhappy clients when medications are not avaialbe for repeat prescriptions

the system was said to have been so well tested by an independant company, then UAT testing was a seriser of steps wiith no full information, but only testing if the procedure given would get expected answer, in my respects this sytem was not criticly tested n any mesurable means before going live or the results of said indipendent testing were greatly exagerated, leadding to the result of no reall stress testing of the actual day to day processes were done or the results ignored, no back up provisions were made for any critical failings and comunication and teaching of the systwm were so substandard to be almost non exisitant. as a result of this we have lost key staff and knowlage to either stress related illnesses or just leaving the euniversity empoly all to geather. leaving those that did stay scrambling to fix the unfixable, with imposable deadlines, and training new staff. while being told well done and good job, were seeing the light at the end of the tunnel, in my opionion that's the on coming trains head light. the damage is done, the reputation of the teaching and reaserch funding of this university will suffer for the next decade.

I was wating for sending my samples to BGI, Poland. But due to the problem with DHL service regarding due payment, I had to wait for at least 3 weeks just to send the samples which affect my PhD project.

There have been issues with payment of bills to stockists to the extent that patients are not receiving the appropriate care becuase bills have not been paid on time. Secondary to this I have not been paid for out of hours work for 2 months now, which has lead to me having to rely on relatives for living costs.

No specific effects on me but I have heard stories from many others.

The challenges P&M have caused came at the worst possible time for staff who were only just getting programmes and teaching back on their feet following the incredible strain of COVID. The lack of practical support to fix these issues has been very disheartening to staff who are burnt out from giving so much already to 'keep the show on the road'.

Due to People and Money we had prices increasing by the time purchase orders were raised, items not being delivered due to University unsolved debts, and personally I have to spend such a large part of the day processing orders that my research work is being seriously slowed down.

Delayed ordering, incorrect items received, inability for "team" members to mark items received.

People and Money has complicated the whole process of ordering items for research and made it difficult to carry on our research smoothly. It has been a constant source of frustration as well, not able to order and work as before.

unable to run usual programme, pace of work slowed significantly, petrol card not accepted in petrol station as account had been blocked (had to pay out of own money), because of the latter our pool cars can no longer be used which impacts on our outreach programme,feelings of anxiety and upset in office

Ordering problems

I have really struggled in the busiest time of the year with a considerable amount of additional administrative hurdles because of the new system. e.g something simple like a small School order of School branded hoodies submitted pre the shutdown in July remained stuck. I only found out about this in SEP when I was trying to order the usual main School order which is for 250 hoodies for staff and students and the company said they could not proceed due to the small order from July not being paid. Trying to raise the PO in the first instance took me 2 hours after work one evening trying to work off the PDF, videos and notes from various meetings. I have had similar issues with Spirit Media (the UoE's media buying agency) not being paid from previous invoices pre P&M and have had delays trying to get the new requisition and PO raised for the new campaign. This delay will likely negatively affect our student intake for the year ahead. With so many existing deadlines in the SEP-DEC period for marketing and recruitment colleagues (UG & PGT Degree Finder, UG Open Days on campus, PG Virtual Open Days, not to mention Welcome Week and pre-arrival communications it has been considerable stress on me and colleagues in my team). All of this is happening under the banner of the

pandemic and unfortunately I have close family having chemotherapy so all this additional stress has been a bit much on top of the last few years. I appreciate the system is new and will improve over time but it has certainly been additional stress and work at the busiest time of the year and makes any progress forward extremely difficult.

I work as a core scientist and one of my duties is to learn a new P&M system and help our group to deal with it. I have to admit that cost me a lot of time and nerves. Working with the new system is very stressful. The waiting time for PO is unbelievable long. Every single time I requested PO I had to login to financial helpline and then escalate my case further. Each step takes about a week. It's a time consuming and frustrating. Quotes from our suppliers in different currency are not allowed and my request for PO was returned after 4 weeks of waiting without any communication. Additionally, many times the VAT was added to the ordered items despite the exempt. Not able to order courier via University because unpaid bills at DHL forced me to arrange the service by myself and paid for it from my line manager personal credit card. This is not acceptable.

My PhD student (who started September 2022) was not paid his stipend for September or October, despite students who started after him receiving their pay. It required multiple interventions to get that sorted in November. We cannot expect international PhD students to manage rent and other expenses in the first few months of their degree (when they have just completed an expensive relocation to Edinburgh). I thought this was unacceptable and disgraceful.

My lab has been affected by the already-mentioned inability to order stuff, reduced access to suppliers, and hours of frustration dealing with the software. But, the most striking and upsetting part of this mess is the impact on their mental health and morale. In addition to my lab, I am very saddened by the helplessness felt by a number of our finance staff. Some of them have been stripped of their ability to do their job and it's extremely demoralising.

Restricted licences for access to view catalogue of items agreed as available by procurement means my team can't see what is available and need to order through another team who may not know exactly what it is that we need, so the wrong thing may be purchased or we may be advised something isn't available when either it is, or if it isn't we aren't able to advocate for why it is necessary. No training on procurement for teams who aren't active users doesn't mean we can operate effectively with no information at all when we still need to raise PO's for work or source items.

Extreme frustration as not able to find out any information around payments, suppliers etc which we were able to do prior to P&M.

The hierarchical approval process for all purchasing is a nonsense. As a professor and PI, I have to seek authorisation from my line manager (acting head of college!) to make a £5 reagent purchase. Members of my research group cannot initiate these purchases, as despite repeated efforts they cannot get access to P&M procurement.

PAM is extremely challenging to navigate and frequently not working.

The decision to implement P&M when it is clearly unfit for purpose, the shambolic way it was implemented (shutting down many financial processes for weeks) and the lack of redemptive actions by the university, alongside the severe disruptions to stipend and expense payments, are doing an excellent job of deterring PGR students from considering careers in academia.

The University do not seem to care if they put their staff under crippling individual financial pressure by expecting them to pay for things themselves. Many warnings were given about the chaos this would cause, but no-one would listen.

As a PhD student, I've witnessed many of my colleagues (particularly those that have just started) either being underpaid or not being paid at all. We are aware that our School finance department and support system are really trying hard to address this but this is being made harder by the beuracratic processes forced through by central University with the rush and lack of planning around the launch of People and Money. My thoughts go

out to the staff from the School and to the students and staff affected by lack of pay. For me personally, I'm lucky that I'm still being paid my stipend (including increases) as well as teaching. Where I'm personally affected is claiming back expenses where I'm still due hundreds of pounds over a month after a conference - PhD students shouldn't just be expected to have massive dips in their bank account for long periods. The expectation is that the money is paid back within a few weeks after the claim. Also, the fact PhD students have to claim through a form rather than use the People and Money system like other staff is just foolish. It creates more work for the staff to process details which wasn't an issue for eExpenses claims. It also sets he precedent that PhD students can't be trusted to manage their own expenses! Central University really need to re-evaluate as there seems to be this perception from many in Central University that People and Money is just suffering small teething issues and this is absolutely not the case. The fact this has taken to social media and is being discussed in newspaper should be signalling the severity of the problem. Also, in other professions, not being paid for expenses or for just the job you are doing for months is out of the question and the same should apply to this University.

a complex system with very less support available causing delays, agony and distress among staff and students in the current recession times.

Processing of my maternity leave was stressful and total impersonal, I felt completely abandoned and unsupported with no real person to contact for support.

I agree with the points mentioned in the letter - it's an extremely tiresome and time consuming system

There are two issues regarding the new P& M system a) the system itself is clunky, bureaucratic, slow and inflexible and b) a complete lack of engagement with the end users. No training course were offered or given to those academic staff who use the system for ordering , maintaining grants and administering personnel issues. many of the failures of teh system could have been highlighted before it went live and action to circumvent these failures could have happened. On a personal notes I asked for an urgent PO for a courier to collect an vital sample 10 days ago I am still waiting! The date for teh transportation has passed so when I do receive the PO it will be for a time long gone. This highlights the inflexiblity of the system to respond to urgent requests.

The main problem is obstruction of ordering processes in the HfSA, leading to shortages of products (as providers are not paid, therefore they stop supplying medical products) and addition of work to already overworked staff. The abnormalities in payment to colleagues is also adding to the collective anxiety and stress, as we are a tight community in the HfSA

Delay in processing laptop procurement and refund claim

There is a lack of ability to acquire information about orders after they have been processed so it is unknown where in the ordering process beyond approval. This means that we, as users, are no longer receiving updated on orders such as delays, expected arrival dates or advanced warning of limited stock, which previously was information that was relayed to us which is essential for good planning and preparation within the teaching laboratories. Additionally, alterations to the procedure's surrounding internal stores requisitions are now taking an unreasonable duration of time due to the approval system, meaning that replacing trivial consumables e.g. batteries can now take upwards of 24 hours with the potential to cause undue disruption to the teaching laboratory sessions.

P&M currently, and previously, has been indicating that you can carry over 70 hours of leave into 2023. However, this is not the case, the official rule is 35 hours of leave. As I have been using P&M to track my leave this is likely to mean I will lose holiday entitlement because I can no longer carry over 70 hours and there is not enough time left before the end of the year to take those extra days.

Whilst I am relieved that FINALLY the implications and impact of the people and money system has been brought to the attention of the wider University community, it is a shame that the screams have only been heard once the impact of this has reached the academic and student cohorts. For 3 years front line professional services staff have endured increase workloads, minimal consultation on changes to our work and

job roles and have been forced to uptake new ways of working with little or no support or training. Despite numerous expert front line users flagging flaws and issues with the system during the limited user tester sessions, warnings were largely ignored. Professional Services staff have worked tirelessly to keep "business as usual" operating under extremely difficult and stressful circumstances and it is a testimony to all of these staff that the impact of this system on other groups throughout the university have not been felt before now. Unfortunately for many professional services staff intervention has been too late, and we have lost great a great deal of talent and leadership within our areas due to the shambolic roll out of this system. I hope truly hope that voices are finally been heard, change is coming and that management are now held accountable for this decision.

I have not been directly affected in my role, however as part of the CSE college research office team we have regularly been hearing how professional services colleagues within the CSE schools have been adversely affected. It is upsetting to hear the level of negative impacts that this system roll out is having on colleagues whilst feeling powerless to help.

This software has caused no end of frustration to myself, but I am prepared to accept this as part and parcel of transition to a new way of doing things. However, I am alarmed to discover that some of my colleagues have not been paid and now shoulder outstanding debts. I am particularly concerned for our PhD students, who are most vulnerable in this time of increasing costs. It is completely unacceptable that anyone should go unpaid. It is wholly negligent to blindly deploy software, upon which the livelihoods of so many depend, without the absolute guarantee that it's critical faculties are operational. This naive blundering in search of a grand, unified solution for our financial management has made us a laughing stock and seriously damaged our reputation with our research partners.

I live in a pricey student accommodation flat in Edinburgh after flat searching with friends became an impossible task. Without the stipend payment I am set to not be able to afford my rent and I believe the student accommodation does not take kindly to payments not on time. I am not sure what will happen to my living situation should there be another backlog in payments.

Even though I was not personally affected, I saw most of my colleagues and students very distressed and on occassion had to help them financially.

The way I have been affected has been represented in the letter already.

PhD students and postgrads in Anthropology have an organisation called SoMA (Students of Medical anthropology) that is directly funded though the EdCMA. This year we wanted to use some of our funding for a welcome event and a talk to go with the National Museum's Anatomy exhibition, but because of the change to P&M couldn't access our already designated and allocated funding.

We could not process data from a $10 billion dollar instrument (JWST) for want of a £10 pound network card

I have not been dramatically affected in my day-to-day role but I am frustrated and saddened to see the effect on colleagues and teams across my area and wider. And it has had a knock on effect across all of our roles and capacity. I have had to send emails/call people apologising to suppliers and services and spend valuable time supporting my team and administrators who are really struggling. I also have basically given up trying to purchase anything or claim expenses because it seems so maddening and painful. We have decided not to run events/conduct meeting etc because the idea of spending anything feels like such an added burden. In a wider sense I am really disappointed that what should have been an opportunity to work through a large scale culture change project at the Uni (one with significant benefits) has been squandered and there will be years lost to the ill will it has generated. Really disappointing and distressing for anyone with a role in communications, change management or delivering on wider vision for the UoE.

The additional layers of approval needed for miniscule amount of dedicated funds - for research, paying conference fees, ets - is demoralising and wastes all staff members already stretched time commitments. These comments are inherent in some aspects of the letter but explicitly I want the management to know that

I do not appreciate being treated like a child so I can carry on with absolutely normal, not-that interesting activity, such as paying conference fees without a PO.

I still don't have access to the P&M student along with most PG students

P&M seems like a massive step backwards and adds unnecessary administration steps to what was a working system.   Expenses are being audited so why bother with approvals?? Seems like a waste of resource. I for one would suggest a roll back to the previous working system!!

The way that PAM has been implemented has had a huge effect or employee morale. Never in my professional carrer have I felt the inability to do the job that I am employed to do.

The letter covers all the problems we are experiencing. 'Professional services staff are reportedly leaving the university, in part because of the stress caused by People and Money.' I have had to assist staff in tears whilst struggling with lack of proper training and guidance myself. I cannot do my job properly and am dealing with time consuming issues daily, trying to help people get their expenses, their PO, their invoice paid and so on. It is very disheartening and very stressful and as the helpline are dealing with a high volume of calls, it is almost impossible to resolve issues. The drop ins have been supportive and helpful I have to say. I know of professional services staff who are thinking of leaving now.

It destroyed our admin system, we are there to pick up the pieces. HR, Procurement, Finance, Travel, better pay with your own credit card and get reimbursed for everything. We now spend 1 extra day in admin stuff a week because of this system, it will (already did) destroy both our productivity and morale.

This is an additional comment. I have recently completed my PhD but prior to that I was owed £400 for teaching for over 8 months before I finally got paid. Then, I got charged tax on the amount because I was no longer a PhD student. I was also billed £170 for an invoice for student matriculation fees 10 weeks ago that I was sent INCORRECTLY by finance and I have been waiting this entire time to receive this money back - I had to pay for this on credit card and I am gaining monthly interest on this fee. Recently, I was in an emergency situation where I was stranded in london with no transport or accomodation at 7pm at night on University business. I had to pay for this myself as there are no systems in place or emergency policies to deal with financial issues in emergency situations. Despite numerous communications, I am yet to receive an apology for any of these issues.

I am new staff joined in August this year and my start up fund has not been set up yet

Originally I hadn't been added to P&M so was left unable to process invoices etc. When I was eventually added, all my requisitions seemed to be going into a black hole. It was then discovered that my line manager had not been added as approver.

This has had a devastating effect on the level of service we are able to provide to students, staff and suppliers. The whole situation has left me feeling utterly impotent and as well as the awful connsequences of not being able to complete my job to any level of satisfaction it has affected my mental health. Professional Services staff have been ignored from the very beginning of the P&M Consultation Period. P&M is a one size fits all system for a University made up of a wide variety of Colleges, Deanerys & Centres. THe overall premise does not work for Research Centres and we have been saying this for years - nobody listened then and nobody is listening now.

There are over 550 tutors (external), all over the world that provide vital teaching support for our MSc online programmes. None of them have yet been paid (they should receive a single payment, once a year, in October, that pays all their contributions to the courses in the whole academic year). It is mid November and no payment has yet been issued to any tutor, and there is no sign of any answer to all the queries raised by our admin team to P&M about the processing of these payments.

The new P&M system has not been working properly since it was implemented, resulting in considerable disruption and increased time spent placing orders.

Work projects severely delayed when unable to order reagents with no updates from the help desk even after months of waiting. When having a visiting scientist that is depending on these reagents that is only visiting for 11 months, then having 3 months without reagents is pretty bad!

It's been incredibly challenging to do research in the past couple of months. 8 years as a researcher and I had never experienced such a demotivating and stressful environment. There seems to be nobody to raise issues with and we all feel stuck. Everyday new problems arise and it's hard to progress in our research.

I have not been able to submit my periodic report to the ERC since June 2022. While the ERC has been initially understanding and supportive, it appears that a consistent lack of engagement and communication with the ERC has exhausted their patience with the inability of the university to fulfil clearly contracted obligations for reporting on expenditure. As PI, I have done everything by the book, I have invested huge amounts of time to establish a supportive and inclusive research environment within the project and I am shocked to find myself now confronted with the very severe threat of a critical reduction of funding given the university's breach of contractual obligations. This is stressful (to say the least) to me, potentially devastating for those employed on fixed-term contracts on the grant, hugely embarrassing for the university and incredible un-professional.

Still problems with ordering and many times I do not get a reply, possibly because there are 100 other emails waiting to be sorted. Nobody seems to know how I should get a NIRU certificate for my order.

Thank you so much to the Senate for summarising all the obstacles we are facing with people and money and their suggestions on how to move forward.   However, in my opinion, the recommendations are insufficient. I have lost all confidence in the Principal and in his team, not only for their disastrous implementation of People and Money, but also for their inability to solve the problems and, especially, their lack of accountability. During the last year I was on strike for our pensions, I lost quite a lot of money out of my limited budget for being forced to use Diversity travel, and now my team can not do research due to People and Money issues. I honestly do not have confidence that the Principal and his team are implementing measures that would benefit the Staff, our research or our students. I think the letter needs to request resignations for this disaster, starting with that of the Principal.

My children are getting used to me waking them up in the night when I scream in my sleep. The stress we are all under because of P&M is unforgivable.

We had a perfectly good School ordering system, maintained by the School IT team and administered by the School finance team. This was taken away and now we have no flexibility and no insight into the processes. We still can't sent EITs (despite that being a "Core System") and orders which should have been placed in June are still unable to be progressed. It's like Brexit, they are convinced it was right but we've yet to see a single benefit...

The training I received on the P&M system was not targeted at the people to which it was given and therefore I was left not knowing how to ise the system. Apparently i was not the only one as emails flowed in the consecutive weeks from stores and our lab manager trying to help explain how to do basic ordering of supplies. Having to place orders now is giving me anxiety and impeding my work.

Jewson's has called me to ask for a point of contact with Finance so that they get their invoices paid. Some of them are from 2018! It's disgraceful that reliable companies have to suspend our accounts and postpone our research because our finance team and the whole system has failed!

Inconsistent payment dates

The inefficiency, red tape and bureaucracy of P&M has only put: (i) more burden on academic staff; (ii) tensions between academics and financial admin. staff; (iii) Diversity travel only increase the costs of flights/hotels etc. This is a misuse of economic resources and forces staff to be mis-allocate their research budget.

My research grants have been effected. Delayed payment to partners have caused issues; I've had a number of crises meetings with project partners taking up lots of time and also causing stress. P&M have not yet sorted

out financial codes for the right projects - just yesterday I had to alert finance regarding the wrong coding. Payments to guest speakers have also been delayed.

Unpaid expenses of roughly £200 since September.

I have personal issues with approval - I have substantial amounts of consultancy money, which could have been paid into my personal bank account, but which I choose to use to fund my lab's research; I now need the approval of the Head of School before we order anything other than minor items. My main issue, though, is that the whole system seems to be predicated on the idea that everyone is untrustworthy, and the lower the grade, the less trustworthy you are. I am a UE10, so this is not a personal axe I am grinding, but I have to say it's just a revolting philosophy that seems geared towards making people feel they are not valued. I am at a complete loss to know how such a system was ever approved, but now it has been, please accept that apologising, and seconding more people from finance, just won't cut it. As another commenter suggested, we need external crisis managers in and we need them now, before the damage is completely irreparable.

I have issues with outstanding invoices which were submitted prior to the P&M introduction, and live research grants that lack finance codes. Then there's the issue of restricted functionality within P&M for professional service staff managing grants, which includes but is not exclusive to the PI delegation functionality.

P&M has left us unwilling to spend time ordering more supplies as it seems like most orders will not be fulfilled. Old PO's are still turning up from before the financial shut down either with non-delivery or non-payment and we have no idea how to resolve those issues, on top of no idea how to resolve current issues caused by P&M.

There have been a number of direct effects on my work; 1) need to use money from my mortgage to meet the Universities obligations to collaborators in LMICs, ii) having to delay or re-structure work, including work with live animals, iii) dealing with frustrated and demoralised staff, iv) waste of time trying with actions using the new system taking ~10 times as long as they used to with the old system (worryingly this appears to be a feature of the system rather than a 'teething' problem. Not sure how the implementation of this is meant to benefit the university, its staff or its student. Assume we are too far down the road to revert to old system, but please ensure no further major infrastructure changes are made until this mess is sorted out.)

Delay in research supplies and material. Lack of support.

I am still waiting reimbursement of my dissertation expenses.

Where do I start! Basically, the many problems with P&M take up much more of my time than before which means less time for the research I am employed to do.

My experience of the P&M system so far has been woeful. It is not user-friendly, with an incredibly limited number of items that can be searched for, complex grant coding, and littered with small aspects which waste users' time e.g. not possible to favourite more than one research grant code, unable to add VAT items to all items in an order at once, having to re-fill out previous fields unnecessarily if certain parts are not filled out at the beginning (how can this be after rolling out at other universities - the fact that this has not been changed is in itself worrying). However, my major concern is the poor implementation of the system. Why were so many aspects of the financial system changed at one time, rather than just orders then moving onto invoicing, stipends, etc one at a time. In a university this size, it is clear that each aspect alone is a major undertaking. Even involvement of staff in small aspects (e.g. adding on the new grant codes to orders with the old codes) before the 4 week shut down would have been useful to reveal the many problems aligning the codes. Why could this not have been done using a single department as a test cases with all the old systems still in place as a backup to handle the inevitable problems. Why was there no adequate beta testing with staff of all levels before the 4 week shut-down? Crucially, why was there a need for a 4 week shut-down in the first place - this is a massive university doing cutting-edge research which should not be crippled to implement the system with an all-or-nothing approach. Yes, we can plan ahead to try and make sure that all necessary orders are in put in/expenses paid/invoices paid, but it is inevitable that others will arise across a full month of financial inactivity. It was expected that the would be teething problems in the few weeks after the system went

operational, yet we are many months down the line with far more than teething problems and a backlog of tasks for our finance units that is overshadowed by more problems coming in that can be fixed. How could this level of disruption not be predicted in advance and the implementation been delayed until there were sufficient staff and processes in place in the implementation team to deal with the problems? I understand that the implementation had been pushed back several times and there was a feeling of need to 'bite-the-bullet'. However, it a system that feeds all aspects of university life, it is foolhardy to adopt this approach until all major problems are rectified or strong contingencies put in place. In throws serious doubt on the judgement of those responsible for going ahead, especially when we have just emerged out of a pandemic where students have lost a huge proportion of their MSc/PhD time from the lockdown and drawn-out building restrictions. I have had PhD students in tears and off sick with the worry of being unable to have enough to complete their thesis, and to have this further source of delays when they are already facing considerable self-funded time to complete their degrees is galling. This is a major embarrassment for a University that would like to consider itself as one of the Ivy League

In the process of obtaining a quote for a grant proposal, an established provider of accommodation/venue refused to discuss prices with me for a future event because they've entered into legal dispute with the University because of unpaid bills. This is a rural SME without the cashflow to incure large debts. They won't even provide a quote to enable accurate budgeting for a grant submission. Huge reputational damage for us and financially damaging to other businesses.

One small case study as follows: I have been trying to obtain basic payroll information for my tax return. Oracle has been closed and P and M is now the sole source of such info. But P and M does not have my last P60 - there was no carry over. I have being emailing various people in finance hoping to get help from them but this is another example of staff time being wasted on something tha tshould be relatively simple.

I agree with the proposed letter to the Principal, Rector, and Vice-Principal of Research

I have to pay myself for postage fees and go to the Post Office in person. Then I have to claim the expenses back and check I actually get refunded.

An earlier comment by a colleague stated that an outdoor centre where we take all of our 1st Year Geography students had not been paid and that this might impact on us being able to stay there in the future. They are still owed £12000 and have decided enough is enough. They obviously want paying the amount due, as well as compensation and legal fees. As a result, they are now going to refer this to their lawyers and have copied their most recent email to their MP, the MP for Edinburgh East, and Dr Tim Bradshaw of the Russell Group, as well as the Royal Geographical Society, who accredit our degrees. We are now going to have come up with a new fieldtrip for 140 first year students, which will be time consuming, and accommodation will be hard to find considering our reputation is now in tatters. This fiasco is doing untold damage to our reputation, which will directly impact on our teaching and ability to recruit the best students. It is completely unacceptable that this situation was allowed to develop and I have yet to see proper accountability from those in charge of procuring and implementing People and Money.

Deliveries have gone missing or been delivered to the wrong person. Our stores team cannot track or view orders for our institute, therefore they are unable to help chase items. Our finance team are brilliant and have been extremely stressed and overworked trying to help everyone. However if even they have not been trained properly on the new system, how are we supposed to know what to do? There needs to be proper guidance for the specialist finance teams to be able to do their jobs and then help/train others.

My staff face significant challenge due to failure to pay invoices. A recent example involves an email letter received from University Hospitals of Derby and Burton NHS foundation which requests payment and states "We are concerned that your account remains unpaid despite our earlier correspondence. Will you please ensure that payment is made by return to prevent us having to refer this debt to our DEBT COLLECTION AGENCY". Then, further in the letter "If we do not receive any communication from you, this matter will be handed over to our recovery agents". This letter was address directly to ECTU which caused alarm and concern with front-line staff within the business team who received the email. This cause significant and undue stress

to them and concern to the ECTU management team due to the potential for reputational damage of the UK registered clinical trials unit, ECTU.

Payments associated to field trip activities for expenses claimed were too slow to be processed and difficult to track. As a consequence, staff had to pay big sums in advance to cover the field trip activities. The difficulty of tracking if there may have been double payments, makes the system very costly for the university. It is unfit for facilitating the teaching and research activities of our programmes and unacceptable for the need of payments upfront from staff's personal funds to compensate the failures in the system.

P&M has impacted on all areas of my work. A particularly difficult example is the non-payment of an invoice for a small business on a Hebridean island where we have been doing a lot of community engagement work (2 months on and they are still waiting, and they have had zero communication from the helpline). This is having a direct impact on the cash flow of that small business with potentially catastrophic consequences. The impact for the university is that my grade 5 admin staff are having to field (understandably) hostile emails from this business, and given the reputational damage of the University in such a small community, its unlikely we will be able to continue our community engagement work there.   A huge amount of hard work wasted for our early career researchers who are feeling really demoralised by the whole episode.

Here is an example of how much effort went into trying (and failing) to use P&M to complete a simple delivery of equipment from Edinburgh to London: All in all: - 2 quotes obtained and requisitions attempted through the incomprehensible P&M system - 13 emails sent involving 7 other inboxes - 7 weeks waited to take any real action - Final result was to completely bypass P&M, leaving me to foot the expense - All to make a simple shipment for around £30

One particularly frustrating issue I have faced is that I, and my finance unit, have been unable to actually just find out how much money is left is a grant. This would have been fine if this was only for one or two weeks, but it has been months. During this time I have had grants finish/close to finishing and have been unable to know whether I need to spend remaining funds to finish of particular pieces of lab work or buy small pieces of lab equipment. Similarly, it is difficult to budget existing work and runs the risk of an overspend. I would like to know what the options are to reclaim any money that has been lost from being unable to spend before a grant closing date or pay for inadvertent overspend

We had a massive delay in payment for events and after every trip it takes days to deal with the accumulated paper work to submit expenses, take pictures of receipts, upload then enter endless list of account numbers, analysis (the same effort for a £1 receipt or £1000) soul destroying

As outlined in the letter, I've been impacted by inability to receive computing equipment (I work remotely and there has been no way to courier it to me), and by issues with vehicle hire for research travel.

The system has made straightforward tasks so difficult. I do not know how this system has passed user testing

I have been indirectly affected by p&m. Delays in reimbursement ; having to pay attention for p&m notices so students can get paid ; and delayed responses to other matters due to most support staff being overwhelmed with p&m

The P&M problems meant that two pieces of equipment that were ahipped from China were waiting at Customs for over one month as the payment couldn't be cleared. This resulted in a hold charge that cost more than the equipment itself being charged to the equipment.

It has been distressing and embarrassing for the team to receive and try to respond to upset supplier and external examiner calls remanding their payment.. I hope the entire system can be improved as none of the aspects work well for user.

My first salary payment was missed due P&M removing my saved bank account details.

We are recruiting for a study and our sample collection stopped because both our Royal Mail account and our packing and postage provider were not paid. I have a G and J account which are both inaccessible on P&M and

I cannot report on. I have two grants that have not been set up for months with people being paid on suspense accounts. I cannot charge my e-expenses to the correct grant code. Some of my current grants were assigned to someone who retired in March. I did not have access to several grants even though informing the team that I would need that. I can do no funding tracking for a no-cost extension. It is a disaster and everyone knew it was going to be a disaster and it was many times worse than expected. Large companies switch systems over weekends all the time, any company that requires a month shut down of a finance or HR system should never have been contracted to provide the system.

The authorisation procedures need modified so that they do no all fall to senior members of staff; I am spending huge amounts of time authorising invoices that my administrative assistant did previously instead of doing research, teaching and clinical work. The exclusive use of Diversity Travel needs to be suspended with immediate effect since they are often unable to identify the grant codes meaning that we cannot book travel in a timely manner . You need to take action to listen to people working with this awful system rather than employ someone from outside to sort it

Big question: how it happened that someone thought that it is acceptable to introduce P&M system 6 weeks after the old system is shut? In every reputable company this transition must happen seamlessly: not shutting the old system before final validation of the new P&M system. I believe that lack of accountability to end users by the managers developing P&M is at the root of the problem. I am afraid that this mode of operation (disconnection from people on the ground) leads to gradual deterioration in many areas of the University life. Proposed solution: creation of an academic cross-university advisory committee (people on the ground) reviewing current administrative practices and participation in new developments may change the situation for the better.

An example of the fallout from P&M. A longstanding collaborator in Australia who provided brain scan reading for many of our large clinical trials over the last 17 years has withdrawn her services since her invoices have not been paid since August and £3000+ is still outstanding. Unfortunately this leaves us with a hole in research capacity to rate multiple scans for large trials, adding yet more reputational damage to the University, and yet more workload to myself and colleague here who will have to pick up the work if we are not to fall way behind. Immediately, I have 60 additional scans to assess - this will go on and run into the 100's.

Dear elected members of Senate,

Thank you for your letter. We take it very seriously that you have taken the time to write to us in such detail and with such strength of feeling, and that so many staff have added their own names and comments in support. I also want to express my heartfelt appreciation for all the effort and dedication that so many of our colleagues have been making over the past few weeks to work through the backlog, provide support to staff and students and help to resolve these issues.

We are also acutely aware that our University is facing major disruption caused by the implementation of our new finance services underpinned by the People and Money system.

We have listened to how this is affecting our staff, students, suppliers and partners and we are sincerely sorry for the unacceptable position this has put people in. We recognise the extent to which this has affected the mental and physical wellbeing of our staff, the difficulties they face in these challenging economic times and the overall human cost of the issues with People and Money.

We value our staff as our greatest asset and we know only too well that for an organisation known for its world-leading research and teaching, priding itself on strong partnerships and looking after our people, this is a humbling situation. We are addressing it as our top priority.

We have already taken steps to pay any outstanding payments to students and to ensure that the upcoming student stipend processes operate smoothly, work through outstanding payments to suppliers and ensure continuity of supply of goods and services, address the backlog of research projects to be added to People and Money and ensure that the finance processes and reports associated with these operate effectively for project teams, and support budget management activity. This will help us to reduce the need for calls to the Finance Helpline and to resume normal service. We've set up task teams, bolstered by dozens of staff reallocated internally, to address these issues. We are monitoring progress daily at the highest levels of the organisation.

Below we have set out our response to each of the concerns you raise, bringing these together where our explanations, actions and commitments apply to more than one topic of concern. We have also detailed the affirmative actions that we are taking based on your feedback, with a number of significant lessons learned, including our commitment to an external review of the People and Money programme to inform our ongoing improvements.

1. The University is failing to meet essential contractual obligations and basic, routine needs of research and teaching.

Our commitment is to tackle the backlog as swiftly as we can and get payments, purchasing and our Finance Helpline working as they should. Once this is addressed, we will review the next set of priorities.

Payments

- We are committed to introducing a mechanism for a one-off payment to those students who we know received late stipend payments in September and/or October 2022. Other people who have experienced financial loss will be given access to hardship funding and processed as a priority.
- If any member of staff needs help with a payment that is or has become urgent, they can speak to a member of their local Implementation Group to escalate it. This is a team of managers who have been working on preparing for, and implementing, these changes in your area. Their details are on our People and Money webpages.

- As outlined below, we'll share an email address with PGR students shortly which they can use to escalate any problems with the upcoming stipend payments for resolution, as quickly as possible.

Stipends

- In September, we made the decision to pay student stipends 'off-system' through a contingency file to the bank, rather than through People and Money. Over 2,000 stipends were paid through this process as expected. A number of issues emerged following this payment, including a delay in payment for students who matriculated after the September stipend cut-off date where our process did not operate effectively enough, and due to issues which arose incorporating varied payment cycles and approach in different parts of the University (for example quarterly payment cycles in arrears/advance).
- In October, we successfully paid circa 2,000 PGR stipends, and the vast majority of these were processed through and paid into the student account on time through People and Money. There was an issue on Friday 28 October, where a payment for around 140 students was not made due to a technical error unrelated to People and Money or our University systems. Finance immediately engaged with the bank and these payments were made on the same day.
- Following that, several issues remained which were escalated either on an individual basis and/or through Colleges/Schools and these were paid as quickly as possible.
- We are putting in place revised plans to ensure that our next set of stipend payments in November and December, and beyond this, are paid successfully via People and Money. We are going to make the next stipend payments by the formal payday of Monday 28 November. We're making extra checks and contingency arrangements in case any issues are encountered. We will share a new email contact address with students and staff so that any problems can be escalated and resolved, on the same day where possible.

Payroll

- Our new payroll processes have been in operation since April 2022 along with payroll-related processes such as setting up new contracts.
- During September and October, we processed a very high volume of contracts (new starts transfers, secondments and additional posts) and where full and accurate information had been received on time, payroll transactions were processed to ensure payment.
- A small number of issues were raised relating to these. We're working with Schools to address these as soon as possible, and to improve our processes in the longer term.

Expenses

- The staff expenses system is operating as planned - these are progressing quickly through the system once line managers have approved any claims.
- We have paid out more than 800 student expenses and our payment rate for these has increased significantly over the past couple of weeks. We do still have a small backlog of student expense payments and, along with stipends, additional staff have been allocated to support the clearing of the backlog and get back to our normal payment routine.

Supplies and services

- We have paid out more than £100 million in invoices, expenses and other payments since our new finance services went live in People and Money. But there are delays in payments and some suppliers have paused supply to us while we work with them to resolve issues.
- We've set up four task teams, bolstered by dozens of staff reallocated internally, each focussed on buying goods and services for a dedicated category: estates; IT and telecoms; medics and labs; and campus and professional services.
- These teams are prioritising escalated issues from budget areas; targeting certain suppliers; and then working on the backlog. Structuring the task teams like this allows us to, for most suppliers, deal with payments and any issues within that from start to finish.
- Because Finance has reallocated staff to support supplier and student payments, this does mean colleagues are not getting the complete service they expect at present. We are trying to get through the backlog as quickly as possible so that they can focus on their day job again.
- Before our old finance system closed, we asked colleagues across the University to close off as many of the financial transactions as we could in eFinancials and prepared to migrate open invoices from the old to the new system. We put in place interim processes for the period of downtime between the old system closing and People and Money being implemented, which in the end was extended to a slightly longer than five-week period.
- We asked the business areas to suppress demand during that interim period, for example by ordering in advance or by delaying transactions where possible, but we knew there would be some activity that would have to carry on during that period and that there would then be a backlog of payments to process as a result.
- Despite the planning we put in place, the key areas we have highlighted have been a significant challenge since launch. The most challenging and complex supplier payments relate to processing payments which took place while our systems were closed, and from before the launch of our new finance services in People and Money.

Research grants finance processes

We are aware of increasing concern about the potential risk to our core activity unless there are some quick resolutions to outstanding issues with the finance processes which support our research activity, over and above those covered above. We are taking the following actions:

- We're making some changes to the Project Administrator role and have been in touch with the staff affected. We're working with the Colleges to reallocate the Project Manager system role, on an exceptional basis, within local areas, to reduce the number of system approvals going to Principal Investigators.
- We are making changes to the visibility of project information through reports which will give people an overview of the information for their projects and/or areas of responsibility.
- Since launch, we have created 86 research projects in People and Money with a further 175 in the set-up phase and 365 projects which need to be set up. We will run repeated, focussed 'sprint' sessions with colleagues from ERO, the Colleges and ISG to resolve this backlog. This will be done on a prioritised basis agreed with the Colleges, alongside regular progress monitoring.
- We know delays in opening projects on the system have had a knock-on effect on recording costs for Schools' unrestricted funds. Guidance and templates for moving costs between project and non-project codes will be shared in November to allow Schools to tackle this, and guidance on project-to-project fund movements will follow shortly.

Financial documentation requirements

- Previously, staff who also received stipends could view both their stipend and their salary on the payslip. This is no longer possible because, since the launch of our new payroll services in April 2022, scholarship and stipend payments are now made by bank transfer via our Accounts Payable team, rather than through the payroll.
- When stipend or expenses payments are made, a remittance advice will be sent by email. This provides assurance of the amount being paid monthly and that payment is on the way. This replaces any payslip that was received prior to April 2022.
- This means that the information about pay and any stipend or scholarship is still available, but in different documents.
- We realise that the information in these two sets of documents may not have been clear since our new finance services launched in August. We hope to have now addressed this so that, in future, staff in this position will get the information they need through these two sets of documents. We'll continue to monitor this and take action where needed to ensure information is clearly set out.
- Payslips and salary information can be found in People and Money. Payslips and P60s from before the launch of our new payroll services in April 2022 were available to view in the previous Oracle system until July 2022 – we issued communications in the months before with reminders to staff to download these in advance of the deadline.

2. The University is creating unworkable demands on frontline professional services and academic staff both short-term and chronically, harming wellbeing and careers.

Our colleagues work very hard to ensure that most of us don't have to be in the position of thinking in detail about back-office processes and systems. We know that we all need them to work smoothly so we can get on with our jobs, whether it's research and teaching or supporting these or other aspects of our core mission.

We're very sorry that the introduction of our new services and system have created such unsustainable pressure on staff at the frontline of our research, teaching and administration. The changes in processes and system have had an immediate impact on colleagues who purchase goods, pay for goods and support our key financial processes. We knew that would be the case, but this has been compounded in several ways, including through the much bigger than anticipated backlog and the fact we were unable to get the right training to all the right staff ahead of launch.

We are tackling some of these issues by putting in place dedicated teams to manage the most difficult issues - enabling us to cut rapidly across the University to solve them - and bringing in new staff where needed, but we recognise that this is a partial and temporary solution.

We've agreed a number of medium- and longer-term actions:

Promotions and career prospects

We are aware that some Schools have already closed their academic promotions submission window. The process and deadlines for submission have been published well in advance and staff have been encouraged to work towards these. However, if there are members of staff who have been working on their application but have not been able to submit on time due to additional work they have undertaken as a result of People and Money, they should raise this with their Head of

School or Dean. Under these circumstances, we will consider late submissions up to Thursday 15 December 2022.

Training and support

As well as the system changes and the processes they underpin, new teams have been formed to help with buying goods (Procurement Operations) and with the ways in which we get money into and out of the University (Finance Operations). This follows on from recent changes in how we support budget areas (Finance Business Partners). Fundamentally, the way we look at our financial information is also changing as we introduce a new Chart of Accounts.

We knew staff in all areas would need to get used to our new business processes and system and that this would take time. We also understand that in some areas, training has been compromised due to our tight timelines for delivery. We apologise for that and we are taking steps to provide further training where needed.

In the months before launch, we needed to complete user acceptance testing, start the implementation cutover activity, and train our staff. With limited time, we had to make difficult decisions about priorities.

Dedicated training was provided to finance specialists, Principal Investigators, and other staff, for example in administration and research support roles. Between 28 July and 30 September, we delivered 41 training sessions across the University to 2,820 attendees. Specific scenarios are being identified for improved training including additional 'how to' videos.

For wider staff, we ran a series of training sessions, including line manager and budget holder approvals; how to request goods and services (for both staff and students); and, for business support staff in Schools and departments, training for requesting invoices and non-PO payments.

Guidance, guides and videos have been accessible via our People and Money webpages since before launch, although there are still more to complete. Following feedback from support clinics we will provide additional training on the sales invoicing process and the purchasing and requisition process including specific requisition scenarios such as VAT, call off and value-based requisition. We will also follow up with Implementation Groups on further training requests. Drop-in sessions are also running on Mondays, Wednesdays and Fridays every week. Colleagues are on hand to answer questions related to the new finance system. A link to the schedule is available on our People and Money webpages.

We recognise that familiarity and confidence in using our new system and processes is crucial to get things moving again. Training and support will form a key plank of our ongoing support now and over the next couple of years.

Staff morale and ambition

It does take time to get used to our new system and we know this is slowing things down and making life harder. We understand that this is the last thing people need when they are so busy and under pressure. We are very sorry that it is causing so much disruption to your work.

We hope that current and future staff will see the steps we are taking, including those outlined in this letter, as positive evidence of our commitment to making the situation better and to ensuring that the University of Edinburgh will continue to be a prestigious and rewarding place to study and work.

Administrative processes

Our new financial approvals are carried out by every line manager in the People and Money hierarchy until the transaction reaches an approver with the required level of authority for the type of transaction. The one exception to this is for financial transactions approved within the Projects and Grants module, where approvals are initially routed to the Principal Investigator or Project Manager, or an optional requisition approver with a £10k approval limit.

90-95% of our transactions are of a value that only require one approval. We have always had the need to approve spend, but it's been inconsistently approached in the past, so for some colleagues the change will be disruptive for a period of time. It is, however, a key element of our financial controls which allows us to ensure the right people are sighted on and approving expenditure, so we are meeting our regulatory and auditing requirements around management of our finances.

Finance staffing

Finance is continuing to monitor short- and long-term staffing levels. We have hired new staff and seconded experienced staff from elsewhere in Finance to address the current backlog. We are also working with the wider University to second additional colleagues to work on priority areas. As we work through the backlog, we will return seconded staff to their original roles to minimise the impact on workloads in other areas. We will continue to monitor staff requirements across HR and Finance to ensure there are sufficient staff to support these key services.

3. The University has damaged our reputation and good standing in the sector and public with essential partners.

The University prides itself in fostering good relationships with suppliers, and we are doing our best to ensure all payments are processed as quickly as possible. We have apologised to any of our students, staff or suppliers who are experiencing a delay in payment.

A fundamental requirement for a University such as ours is of course for our processes to work effectively for those we employ, engage with, and for those who supply us. We hope to have outlined in the section above on Services and Suppliers that we are making every effort to regain our standing and reputation with our valued supplier and service partners.

Furthermore, we are aware of the potential impact the recent difficulties will have on our role as a partner in the local economy. We understand fully and recognise the goodwill we have been afforded in these trying circumstances and will make every effort to regain the trust and confidence of our community, including our business partners across the piece.

We are currently working through some challenges in paying international partners, with particular attention to those in the global south. We remain absolutely committed to our partnerships across the globe and appreciate that this issue exacerbates some already strained relationships with partners, particularly those previously affected by UKRI GCRF budget cuts. We are addressing individual issues as they are escalated and working across teams to ensure that all international partners are set up appropriately for payment in the future.

4. The University has lost members' trust and confidence in our leaders' capacity to prioritise essential needs and manage central change processes.

Throughout the planning and implementation of People and Money and other change projects, we have been carrying out a series of Lessons Learned sessions so that ongoing improvements can be made to planning and implementation.

We take contingency planning seriously and we did put measures in place to address risks and issues, however the impact of the backlog which built up during the interim period has been significantly greater than anticipated. Additionally, there were unexpected issues with the September and October stipend payments and student expenses which are now being rectified.

On addressing Equality, Diversity and Inclusion, we confirm that the People and Money system complies with the industry best practice Web Content Accessibility Guidelines. Our procurement process focussed on making sure our system is available to as many staff as possible and this continues to be a priority. Additional improvements will be made following the external review mentioned above as required.

We have held a number of open staff meetings over the past weeks to listen to staff concerns about People and Money and to provide an update on the actions that are being taken to resolve issues as quickly as possible. We have also held an open meeting for PGR students to address concerns around stipends and expenses. Senior managers are committed to updating staff and students more regularly on the actions that we are taking to address issues.

5. We expect a better response from University leadership.

The senior leadership team and University Executive, the Policy and Resources Committee - a key sub-group of Court - and the full Court itself have discussed People and Money extensively over the past few years. Although we don't generally make public announcements about such discussions, we accept that we should have communicated more fully the importance that has been accorded to the new system and the challenges it has posed to many of you. We are taking steps to improve the way senior leaders are listening to staff and students, and we are establishing more regular updates as issues are addressed.

Throughout the years we have been preparing for and launching each phase of the People and Money implementation, we have provided regular briefing calls for leaders and emailed staff and students directly with updates. We also provided an outline of the changes coming up, including guidance materials and demo videos, via a dedicated pre-launch SharePoint site which our communications directed people to for more information.

This is in addition to targeted briefings and engagement with local Implementation Groups, set up in each College and professional services group to plan for and deliver the changes in their area.

Addressing complaints

To show how we're responding to staff concerns, we have collated feedback from the recent staff and student open sessions and will be producing and sharing a series of FAQs as soon as we can to provide further updates on the steps that we are taking to address concerns raised by staff and students.

As mentioned above, we have committed to an external review of the People and Money programme to evidence and inform this continuous improvement.

Delivering strategic change

We are a large, successful University with an ambitious strategy, and so we must continue to innovate. Nonetheless, we are listening to our community and are now reviewing the ways in which we lead and manage major strategic change projects.

We realise there is dissatisfaction with the way some of these larger initiatives have been developed and delivered in recent times, and we fully recognise that this applies to the People and Money programme and in particular to its most recent, final phase.

While lessons are being learned and applied, we know that more needs to be done to significantly improve the quality of the way in which we deliver strategic change projects and realise their intended beneficial outcomes.

As mentioned above, a paper on 'recommendations for future provision of strategic change and continuous improvement support' was recently tabled at University Executive which reflects on a number of key issues that have been escalated. These initial reflections and recommendations will necessarily require broader engagement and input from colleagues in different parts of our University, with those discussions helping us shape a more effective approach to strategic change and continuous improvement in the future.

As part of this, we have, as noted above, committed to an external review of the People and Money programme to evidence and inform this continuous improvement.

Next steps

By way of conclusion, we note below the key actions and initiatives that we will undertake to address our current challenges:

- External review: we have committed to commissioning an external review of the People and Money programme with the intention of gathering evidence to inform recommendations which will focus on improvement.
- The Enactment Group will continue to meet weekly, subject to any further review. As well as overseeing the actions and priorities set out here, the Group will support the establishment of the new People and Money Operations Group. In turn, this will focus on embedding and enhancing the People and Money system and the finance and HR processes it underpins.
- Local Implementation Groups will continue to meet regularly, to listen to concerns and to respond with actions.
- We will improve our levels of engagement and communications both with the senior management of the University and the Operations Group recognising how critical user engagement is now and will be in the future. We are taking steps to improve the way senior leaders listen to staff and students and will establish more regular dialogue as issues are addressed. We will continue to engage with staff and students regularly over the coming weeks.
- ISG, Finance, HR and the remainder of the project team will continue to work together to help ensure resources are aligned to the agreed priorities. We will maintain support calls, Teams channels and other support and communication mechanisms during this period. We are also actively looking into how we can provide further training and refresher sessions.

- The Enactment Group set out a set of indicative priorities for the period from the start of November 2022 to the end of January 2023. Its highest priorities and areas of immediate focus are the backlog of supplier and student payments and stabilisation of those processes, research grants finance processes, budgeting and forecasting and any system defects impacting on these areas. We have previously set out the resources that are being prioritised to address the payments backlog and the projects backlog.

In addition to this, we are committed to the following:

  - Complete the recruitment of a People and Money service team which will sit in ISG. Once operational, this team will work in partnership with the Colleges, professional services areas, HR and Finance to lead the ongoing performance, development and enhancement of the systems which underpin our University's HR and finance activities and operations.
  - In addition to this, we are recruiting new roles to support enhancement and continuous improvement activity. This includes Finance functional leads and professionals to work on HR process improvement, business analysis and training.
  - Extend the support provided by our implementation partner Inoapps and keep this under review, with a focus on tackling remaining finance system defects. We have also extended the time that a number of our Finance functional leads will remain dedicated to the post-launch work to the end of the calendar year. We have extended dedicated support from some of the programme team, change team, and business analysis support, as well as the accelerated customer support offered by Oracle.

In response to the questions of leadership and governance, the University Court has received regular updates on the progress of People and Money as part of ongoing business activities and are aware of their responsibility to hold to account the management of the University.

We hope this response goes some way to conveying the depth of our apology, our commitment to radical and urgent action to resolve the situation and to learning lessons for the future. Our thanks, again, to you and our wider colleagues for writing to us and we look forward to working with you as we address and radically improve this situation in both the short and longer terms.

Our work with you, Court and Senate will fundamentally underpin this effort.

I offer apologies again from myself and all members of the senior leadership team and from the very large number of colleagues involved with leading, planning and delivery of the People and Money programme for all the distress caused by recent difficulties. Please accept our shared commitment to ensuring that the situation improves as quickly as possible, and that lessons are learned. This spirit of continuous learning is fundamental to our University.

Peter, on behalf of the senior leadership team

Please note:

Your letter is addressed to me as Principal, to the Rector and to the Vice-Principal Research and Enterprise. I am replying in my capacity as Principal on behalf of the whole senior leadership team which I chair, also as Convener of Senate. The Rector is not a member of the senior team or indeed of the executive leadership of the University and she might wish to provide her own response: she is copied on this reply for her information. If you wish to copy Court on correspondence, it would be best to address the Senior Lay Member who is the de facto Chair of the University. Since this response is in the interest of the entire University community, we will be publishing on our Staff News webpages at the point of sending to you.

University Court Statement on People and Money

The University's governing body, the University Court, met on 5 December 2022.

The University Court, the University's governing body, met on Monday 5 December and considered a management update on the People and Money system and a proposed response from the Court to the open letter from many elected members of Senate, in addition to the previously published response from the Principal to the letter.

As with the Principal's response to the open letter, the management update recognised that major disruption has been caused by the implementation of new finance processes underpinned by the People and Money system and apologised to all those affected within and outwith the University community. It emphasised that all colleagues involved are prioritising reducing the backlog and improving support, including adding additional staff to the Finance Operations team, to stabilise the new finance processes as rapidly as possible.

Court acknowledged the impact on the University community and the significant efforts of staff in managing the implementation and supported the work to stabilise the new finance processes as rapidly as possible and the next set of priorities beyond this, as set out in the Principal's response. In response to the letter from many elected members of Senate, Court agreed that:

a. A timely and rigorous external review should be instigated with a proposal on commissioning, scope, and timescale of the review being brought back to Court for approval, recognising that this needs to be balanced against completion of the stabilisation work currently underway.

b. The outcomes of the external review should help to inform future decision-making and oversight for major change projects and system procurement and implementation. It was noted that the University Executive is actively considering the approach to the future provision of strategic change and continuous improvement support.

c. Consideration will be given by the Remuneration Committee (a committee of Court) to the People and Money planning and crisis response when assessing performance as part of its annual review of remuneration of members of the Senior Leadership Team.

Court and its committees have had active oversight of the People and Money programme since its inception and will continue to receive regular updates on the progress of the stabilisation work coupled with substantive papers to be presented at forthcoming meetings.

Janet Legrand KC (Hon)

Senior Lay Member, on behalf of the University Court

This article was published on 6 Dec, 2022

Dear Principal, Senior Lay Member, Vice-Principal of Research and Enterprise and Rector,

Thank you for your letter, shared with us and the University community on 18th November 2022. We appreciate that you have taken the time to respond to the points raised in detail and recognised the major disruption caused by the implementation of our new finance services underpinned by the People and Money (P&M) system.

We welcome that the Senior Leadership team have recognised that this is both a humbling and unacceptable position for the University to have placed its staff in, and that they are sincerely sorry for the impacts on the mental and physical wellbeing that have ensued.

However, the response minimises the significant and ongoing problems that staff are facing with the system, has major gaps in the explanation of how we got to this point, and is lacking on both mechanisms to solve the problems and the timescale in which the problems will be solved.

In view of the response received, as members of Senate, we request answers to a number of more specific, concrete, and especially urgent questions speaking to the concerns raised in the letter:

- **Payments**
  - When can postgraduate research students with outstanding expenses expect to be paid?
  - When will postgraduate students be given access to the system to be able to claim expenses directly, as they could prior to the implementation of P&M?
  - When can all other staff expect payments they have made out of their own pocket to be reimbursed?
- **Stipends**
  - Were November stipend and scholarship payments to postgraduate students all completed successfully and without requiring students to chase missing or misdirected payments individually?
  - Can the December stipend payments to postgraduate research students be guaranteed?
  - Will there be adequate staffing over the Christmas shut down to be able to deal with any outstanding stipend payment issues, and will these channels be communicated to all students well in advance?
- **Payroll**
  - When will the backlog of new contracts (new starts, transfers, secondments and additional posts) be cleared?
  - When will employees be able to obtain proof of their annual salary from the P&M system now that it is not listed on their payslips, and without having to raise an individual query with HR?
  - What provisions are being made for access to historical pay and tax information, and when will these be available to staff?
  - When will staff P60 documents be available to view directly online in People and Money, as stipulated in the University Payroll policy?
- **Supplies and services**
  - When will the backlog of payments to the University's suppliers be cleared?
  - What compensation, outreach, and other measures will be undertaken to repair our supplier relationships and ensure future access and continuity, what is the timeframe for these, and how will success be tracked and evaluated?
- **Research grant finance processes**
  - What is the justification for reallocation of the Project Manager system to local areas on only an exceptional basis – why not permanently, given the specialist knowledge of the needs of the University contained in local areas?
  - How and when will the numerous issues with the approval process (including, but not exclusive to: situations where line managers are not the appropriate approvers, excessive additional

workloads imposed on line managers and dead-end approval chains) be rectified?
- When will the backlog of 365 research projects still to be setup on P&M be addressed?
- Is the system prepared for a second wave of orders, once staff who are currently not making orders while the backlog is cleared resume their normal ordering practice?
- Will there continue to be extra staff and resource made available for this foreseeable second wave?

• **Training and support**
- Given the failings in providing adequate training to users of P&M so far, how will the training being provided be improved to help address the numerous issues users are currently facing with the system (as outlined in the comments accompanying our original letter)?

• **Administrative processes**
- How does a user know the appropriate level of authority required for their transaction?

We request that the senior lay member of Court liaises with the Senate Assessors to ensure that the answers to these questions are provided to the relevant Court committees in a timely manner.

As with our previous letter, we recognise that the situation is fast-moving. We will be looking to see a prompt response from the University Senior Leadership Team to the specific questions outlined. We expect to bring a paper addressing unresolved and emerging points of action to our next ordinary Senate meeting on February 8th 2023. We look forward to responses, in both word and deed.

Signed, the Elected members of Senate:

Dr Adam Budd (HCA)
Dr Aidan Brown (School of Physics and Astronomy)
Dr Alan Convery (School of Social and Political Science)
Dr Andrew Connor (ECA)
Professor Antonella Sorace (School of Philosophy, Psychology and Language Sciences)
Dr Arianna Andreangeli (Law School)
Dr Ashley Lloyd (Business School)
Dr Ben Goddard (School of Mathematics)
Professor Caroline Heycock (School of Philosophy, Psychology and Language Sciences)
Dr Charlotte Desvages (School of Mathematics)
Constantinos Eleftheriou (CMVM)
Professor Daniel Friedrich (School of Engineering)
Professor David Ingram (School of Engineering)
Professor Diana Paton (HCA)
Professor Edward Mitchard (School of GeoSciences)
Dr Ingrid Young (CMVM)
Professor Jane Calvert (School of Social and Political Science)
Dr Julian Bradfield (School of Informatics)
Professor Ken Rice (School of Physics and Astronomy)
Dr Mark Williams (School of Physics and Astronomy)
Professor Margarete Heck (Deanery of Clinical Sciences)
Professor Marialuisa Aliotta (School of Physics and Astronomy)
Professor Mary Brennan (Business School)
Dr Matthew Novenson (School of Divinity)
Professor Melissa Terras (ECA)
Dr Michael Barany (School of Social and Political Science)
Dr Murray Earle (Law School)

Dr Pablo Schyfter (School of Social and Political Science)
Dr Pau Navarro (MRC Human Genetics Unit)
Dr Peter Adkins (LLC)
Dr Rebecca Marsland (School of Social and Political Science)
Dr Simone Lamont-Black (School of Law)
Prof Steff Lewis (Usher Institute, CMVM)
Dr Steven Morley (Edinburgh Medical School)
Dr Stuart Gilfillan (School of GeoSciences)
Dr Tamara Trodd (ECA)
Dr Tom Booth (Department of Psychology)
Professor Tony Carbery (School of Mathematics)
Dr Uzma Tufail-Hanif (Deanery of Clinical Sciences)

Dear Principal, Senior Lay Member, Vice-Principal of Research and Enterprise and Rector,

Thank you for your letter, shared with us and the University community on 18th November 2022. We appreciate that you have taken the time to respond to the points raised in detail and recognised the major disruption caused by the implementation of our new finance services underpinned by the People and Money (P&M) system.

The letter acknowledges the deeply problematic state of the P&M system implementation, issues in communication around the new system, and misjudgements in the risk assessments made during the extended P&M process. These issues and admissions, among many others, clearly indicate a need for a thorough external review of the change implementation process for P&M. We welcome that the need for such an external review was clearly recognised in the letter.

We welcome the desire expressed in the letter to improve change management as a whole across the University and demonstrate accountability for the recognised failures of this change process. However, the letter provides no details or framework for this review; neither does it indicate how the results of the review will be considered alongside the "lessons learned" exercises being conducted by the University Senior Leadership Team. Based on feedback from the university community and discussions among elected Senate members, we would like to follow up the commitment to review by outlining key expectations for the review, its timelines, span, composition of the review team, and specific questions we believe it needs to address.

Timelines: We request that the process of identifying the chair of the review panel should begin immediately. The overall timeline for completion of the review should be set out by the chair, once they have had opportunity to understand the scale of the task, and the volume of information to be considered. We would expect a chair to have been identified by Tuesday 7th February, 2023, and for an update to be provided at our next ordinary Senate meeting on February 8th 2023.

Review Team: The chair of the review team should have demonstrable experience in conducting large scale organisational change reviews. They should be independent of all previous stages of the P&M process, Oracle and any other commercial organisation with an interest in the Oracle or similar systems, and other change projects led by members of the University Senior Leadership Team within Edinburgh or other institutions.

If the chair is not experienced with change reviews/audits specific to major software implementation, we would request an additional independent individual with expertise in these specific changes to be included in the process where required.

We would anticipate the chair would require support from a number of individuals from within the University to be able to understand the scope of the issues with P&M, as well as administrative support in the identification and accessing key documentation, meeting minutes etc. As such, we would envisage a review team including a number of elected members of senate, key members of professional service staff, and administrative support from the Principal's office.

To support the time commitment required for the review and to ensure it is given due priority, an appropriate fractional buyout should be offered to the Schools or Professional Service groups of participating staff in order to not increase their workloads unduly.

Impact on other P&M activities: The resources to complete the review should not be taken from existing efforts to fix the immediate and substantial issues with P&M.

Documentation: The review panel should be granted full, timely, and unredacted access to all documentation that are deemed relevant to the scope of the review (see below), independent of FOI considerations.

Reporting: The final report should be made available to all members of the Court and Senate. In the ideal case, the full report will be openly available to all employees of the University, and at least a detailed summary should be made public in a timely manner.

Scope: We believe the review needs to consider all stages of the decision making related to P&M. Specifically, we would like the review to cover:

- Management and reporting structures,
- RACI (Responsible, accountable, consulted, informed) framework – or equivalent – for all key stages linked to the management structure
- the initial problem identification with the old systems,
- the business case for change and alternatives considered for the specific change process adopted,
- procurement process: inclusive of selection criteria, value for money analysis, CSR and sustainability etc. and the rationale for P&M over competing options,
- Prioritization of functionality for P&M as part of selection and rollout (e.g. application of MoSCoW or similar framework)
- project timelines and modifications,
- risk assessments and risk mitigation for each stage of the project based on risk registers (or equivalent),
- employee engagement plan,
- results of employee engagement activities problem identification and responses,
- intended project audit plans,
- decision-making, staffing, and approach to crisis response as faults were identified,
- impact (personal, financial, etc.) of system failures on staff and students,
- impact on university partners and suppliers,
- impact on university research outputs and teaching,
- impact on university finances.

Change audit framework: While the chair can be expected to adopt their own audit model and structure, in order to indicate the kind of formal framework for the extent of review we consider appropriate, we have included in this letter (Appendix A) one example change audit model.

Key questions: Critically, we believe the following strategic questions should be answered:

1. Is P&M fit for purpose?
    a. How many of the system requirements agreed to as part of the procurement of P&M are currently failing?
    b. To what extent were these failings anticipated as part of pre-implementation staff consultations and risk assessment processes?
    c. What actions were taken in response to these warnings and who was responsible for ensuring the adequacy and effectiveness of these actions?
    d. Were the specific requirements of grant management assessed against the functionality of P&M, before implementation?
    e. How can the current inability to track payments, see balances, etc, within grants, and the inability to transfer between restricted and unrestricted funds - both of which are essential to grant management - be explained or justified?
2. Why was it necessary to shut down the old finance system for 8 weeks in the transition to P&M?
    a. Who was responsible for this decision?
    b. What was the extent of the pre-testing, training and risk assessment, and on what grounds were these considered adequate for the transition to proceed?
    c. What fail-safes were put in place? And why have these not worked?
    d. Why did the transition proceed without clearer assurance that the system and staff were prepared to undertake the switch within a tolerable allowance of disruption?
3. What plans were in place for the rapid response to arising issues, who was responsible for their implementation, and why were these plans so inadequate to deal with the scale of the issues?

      a.   Why did it take as long as it did for the magnitude and impacts of the issues to be recognised and acknowledged, and were the responses commensurate to the volume and seriousness of the impacts?

4.   What plans are in place for the long-term review, development and support of P&M activities?
      a.   How will core functionality be evaluated, tracked and, where required, fixed after the initial implementation problems are resolved?
      b.   Given current experience, is this resourcing of these activities sufficient?
      c.   If not, how will this be extended and developed?

5.   Overall, is the University of Edinburgh approach to planning, implementing and reviewing, major change projects sufficient for purpose?

Current & Future Change Projects: We would ask that the University respond to the report, and detail how the findings will be integrated within the University of Edinburgh change management approach, and that this be brought to Court and Senate for review and discussion, and to be subject to comment by the review chair.

Finally, we ask the Senior Leadership Team to consider pausing all other major change projects on going within the University (e.g. Curriculum Transformation); until the review is complete, and the subsequent proposals and reflections on change management can be implemented into these projects.

Thank you for your time in reading this letter, and we look forward to working constructively with the University Senior Leadership Team in reviewing P&M.

Signed, the Elected members of Senate:

Dr Adam Budd (HCA)
Dr Aidan Brown (School of Physics and Astronomy)
Dr Alan Convery (School of Social and Political Science)
Dr Andrew Connor (ECA)
Professor Antonella Sorace (School of Philosophy, Psychology and Language Sciences)
Dr Arianna Andreangeli (Law School)
Dr Ashley Lloyd (Business School)
Dr Ben Goddard (School of Mathematics)
Dr Benjamin Wynne (School of Physics and Astronomy)
Professor Caroline Heycock (School of Philosophy, Psychology and Language Sciences)
Dr Charlotte Desvages (School of Mathematics)
Constantinos Eleftheriou (CMVM)
Professor Daniel Friedrich (School of Engineering)
Dr Darrick Evensen (School of Social and Political Science)
Professor David Ingram (School of Engineering)
Professor Diana Paton (HCA)
Professor Edward Mitchard (School of GeoSciences)
Dr Ingrid Young (CMVM)
Professor Jane Calvert (School of Social and Political Science)
Dr Julian Bradfield (School of Informatics)
Professor Ken Rice (School of Physics and Astronomy)
Dr Mark Williams (School of Physics and Astronomy)
Professor Margarete Heck (Deanery of Clinical Sciences)
Professor Marialuisa Aliotta (School of Physics and Astronomy)
Professor Mary Brennan (Business School)
Dr Matthew Novenson (School of Divinity)
Professor Melissa Terras (ECA)
Dr Michael Barany (School of Social and Political Science)
Dr Murray Earle (Law School)
Dr Nadia Tuzi (School of Biological Sciences)
Dr Pablo Schyfter (School of Social and Political Science)
Dr Pau Navarro (MRC Human Genetics Unit)

Dr Peter Adkins (LLC)
Dr Rebecca Marsland (School of Social and Political Science)
Dr Simone Lamont-Black (School of Law)
Prof Steff Lewis (Usher Institute, CMVM)
Dr Steven Morley (Edinburgh Medical School)
Dr Stuart Gilfillan (School of GeoSciences)
Dr Tamara Trodd (ECA)
Dr Tom Booth (Department of Psychology)
Professor Tony Carbery (School of Mathematics)
Dr Uzma Tufail-Hanif (Deanery of Clinical Sciences)

Appendix A

Table A.1: Key information for change evaluation

1	**Governance**
a	A paper/presentation on the agreed Governance Structure including key members of Governance body
b	Subsequent meeting minutes, actions and reports/papers to Executive Management
c	Statement of Agreed Success Criteria against which to judge progress/slippage of Change
d	RACI (or similar) document showing clear lines of Accountability and Responsibility for elements below
2	**Project Plan**
a	Project Group Members
b	Reporting requirements to Governance Group and Operational Management
c	System Selection
i	*Business requirements*
ii	*Technical specifications including Integration with other systems*
iii	*User Interface specifications*
iv	*Cost*
v	*Security*
vi	*Evaluation of Potential Suppliers against requirements*
vii	*Sign Off on chosen solution*
viii	*Meeting Minutes/Actions and Reports including Risks*
3	**Engagement Plan (Change Management)**
a	Engagement Group members
b	Engagement Strategy
c	Stakeholder Map
d	Reporting requirements to Project Group/Governance Group
e	Meeting Minutes/Actions and Reports including Risks
4	**Finance**
a	Business Case and sign off
b	Independent Reports to Governance Group
c	Reports/Recommendations on changes to Business Case to Operational Management
d	Authority/Sign Off on significant changes to Business case
5	**Risk Management**
a	Agreed Risk Matrix/Methodology
b	Risk Register with entries and updates
c	Reports/Actions to Governance / Project/Engagement Groups
6	**Audit/Evaluation**

Dear elected members of Senate,

Thank you for your latest letter regarding People and Money. Please be assured that we are still acutely aware of the ongoing disruption and colleagues across the University remain dedicated to resolving these challenges as quickly as we can.

You have raised concerns about establishing timelines for when these issues will be resolved. We are making progress on key issues, however the overall picture depends on a number of variables which will impact these outcomes. We will continue to work diligently on our plans to tackle the issues and update the University community regularly as we progress.

The individual points set out in your letter, along with positive action being taken to resolve them, are outlined below.

Payments

When can postgraduate research students with outstanding expenses expect to be paid?

We are making student payment expenses on a regular basis. Once student expenses are submitted, processed and approved, payments are made each week.

More than 1,550 student expenses have been made since People and Money went live and we have a specific call queue in the Finance Helpdesk to identify approved expenses and pay them on a regular basis.

When will postgraduate students be given access to the system to be able to claim expenses directly, as they could prior to the implementation of People and Money?

We have listened to feedback and will investigate ways we can improve the process for students, including self-service forms. This will be carefully reviewed once the immediate challenge of the backlog has been cleared.

When can all other staff expect payments they have made out of their own pocket to be reimbursed?

More than 7,500 expenses, totalling more than £2.1 million, have been processed since our finance services went live in People and Money. Staff expenses, once approved by a line manager and in line with the expenses policy, are being paid on a regular basis – at least weekly.

Stipends

Were November stipend and scholarship payments to postgraduate students all completed successfully and without requiring students to chase missing or misdirected payments individually?

There were very few issues with the payment of PGR student stipends in November, and where these were identified they were resolved as quickly as possible.

Can the December stipend payments to postgraduate research students be guaranteed?

We are making every effort to ensure December payments are made on time. We are following the same process this month as we did in November, as well as bringing the payment date forward to before Christmas. The process includes a quality assurance check with the Colleges as well as a contact form and email address for students to raise concerns.

Will there be adequate staffing over the Christmas shut down to be able to deal with any outstanding stipend payment issues, and will these channels be communicated to all students well in advance?

Staff and students should follow established finance procedures during the winter break. We are planning for business continuity during the closure, building on the standard emergency payment process Finance puts in place each year. We will of course also ensure that staff who have been working tirelessly over the last few months are able to take some well-earned time off.

Payroll

When will the backlog of new contracts (new starts, transfers, secondments and additional posts) be cleared?

The HR Operations team are processing contract requests in real time – there is no backlog. The HR Operations team successfully processed all payroll-critical transactions ahead of the December payroll cut-off deadline where full and accurate information was received on time. They continue to provide an additional triage service to review contract requests on receipt to flag any missing or incomplete elements within the submission.

When will employees be able to obtain proof of their annual salary from the People and Money system now that it is not listed on their payslips, and without having to raise an individual query with HR?

We are currently investigating adding a new annual salary screen into People and Money, which will allow staff to view their full-time annual salary information directly in the system. Guidance will be sent out to let staff know when this is available.

What provisions are being made for access to historical pay and tax information, and when will these be available to staff?

Ahead of the launch of payroll in People and Money in April, we let staff know they needed to download all historical payslips and P60s before the summer as, after this point, it was not possible to provide ongoing employee access to the legacy system to view historical payslips or P60s.

However, all staff can access their payslips since April 2022 via People and Money by going to 'Me' > 'Pay' > 'My payslips'.

Paper P45s are issued to all staff who leave the University and they show how much tax a person has paid on their salary so far in the tax year (6 April to 5 April). Staff leaving receive their P45 shortly after they have received their final payment from the University.

Staff can request historical payslips and P60s from the Payroll team. Please raise a service request in People and Money using the category 'Pay Enquiries – General' or 'P45/P60'.

When will staff P60 documents be available to view directly online in People and Money, as stipulated in the University Payroll policy?

P60s for the 2022/2023 tax year will be available via People and Money via 'Me' > 'Pay' > 'Year-End Documents'. They are usually published in April or May. Communications will be sent out to let staff know when they are available.

Supplies and services

When will the backlog of payments to the University's suppliers be cleared?

We are now paying more invoices than are being received, and have paid out more than £150million in invoices, expenses and other payments since our new finance processes went live in People and Money.

However, we know there is still a backlog of work to get through before we can return to our 'business as usual' volume of invoice processing and activity.

To support this work, Finance has reallocated Finance Business Partners to support backlog activity and the teams are also prioritising issues escalated from budget areas.

We are particularly aware of the impact on research activities, and have a number of 'sprints' underway, where we are working intensively to pay the oldest outstanding invoices, to target specific suppliers and on supplier creation in the system.

What compensation, outreach, and other measures will be undertaken to repair our supplier relationships and ensure future access and continuity, what is the timeframe for these, and how will success be tracked and evaluated?

We strive to have strong collaborative relationships with our suppliers and we have been working hard to maintain and repair relationships. The Procurement team has been proactively managing the supplier relationship with our University-contracted suppliers and has offered to support colleagues with local supplier queries.

Is the system prepared for a second wave of orders, once staff who are currently not making orders while the backlog is cleared resume their normal ordering practice? Will extra staff and resource be made available?

As part of our planning for 2023, we have started to recruit additional staff into Procurement and Finance and this will continue in January. Staff should continue to follow guidance available to order goods and services and set up new suppliers.

Research grant finance processes

What is the justification for reallocation of the Project Manager system to local areas on only an exceptional basis – why not permanently, given the specialist knowledge of the needs of the University contained in local areas?

A decision was recently made based on dialogue with colleagues in the Enactment Group on a way to roll out the Project Manager system access and we are now working with the Colleges to do this.

How and when will the numerous issues with the approval process (including, but not exclusive to: situations where line managers are not the appropriate approvers, excessive additional workloads imposed on line managers and dead-end approval chains) be rectified?

We are in the process of developing our plan for 2023 and some aspects of the approval process will be included in that. We will communicate this early next year once the plan is developed.

When will the backlog of 365 research projects still to be set up on People and Money be addressed?

We are working through the projects that still need to be set up on People and Money. We have processed more than 320 and are working through the remainder of the backlog, as well as new projects that have come in during that period. We will also continue to run 'sprints' in the new year to clear the backlog and get back to a stable processing level.

Training and support

Given the failings in providing adequate training to users of People and Money so far, how will the training being provided be improved to help address the numerous issues users are currently facing with the system (as outlined in the comments accompanying our original letter)?

We are in the process of developing our plan for 2023, and training on the new processes, ways of working and the system form a key part of that. We will communicate this early next year once the plan is developed.

Review

We also received your separate letter about expectations of the external review of People and Money and have noted your points. We would like to reassure you that the University remains committed to a professional external review.

Work is currently being undertaken on the planning, scoping and timing of this review. A proposal will be shared with Court – who have stated their support for an external review – for consideration at a meeting of Court next year.

I hope this conveys that our commitment to radical and urgent action to resolve the situation remains strong. As I mentioned in my last letter, our work with you, Court and Senate will fundamentally underpin this effort.

We will continue the conversation with all staff in the New Year via town hall meetings, direct emails and Implementation Group updates and encourage you to take part in these forums to help us to address these issues.

So that Senate members are kept fully informed of progress around People and Money, rather than responding directly to your correspondence, we will post regular updates on SharePoint for all staff to see – so please keep referring to this page in future.

Peter, on behalf of the senior leadership team

Professor Peter Mathieson
Principal and Vice-Chancellor
The University of Edinburgh

SENATE

8 February 2023

Supporting a Negotiated Resolution to Industrial Action as an Academic Priority

Description of paper

1. This paper recognises that the current industrial action, a continuation of sector-wide industrial disputes of many years running, bears fundamentally on the academic mission of the university. It outlines a number of steps to support a negotiated resolution in the best interest of our academic mission.

Action requested / Recommendation

2. The paper asks Senate to adopt the following motions. These motions are independent of each other and some are open to amendment for alternative approaches, so it is suggested that they be considered for votes and amendments as six distinct items.

    2.1. Senate recognises that the matters subject to industrial action, regarding compensation, contracts, and working conditions, are fundamental to the immediate and long-term success of the university's academic mission. Diminished real-terms compensation, pay gaps, casual contracts, and unsustainable workloads in our university and the sector directly threaten the university's ability to foster the best possible teaching, learning, and research.

    2.2. University management has expressed a commitment to mitigate disruption due to strike action. Senate believes that the only sustainable and effective long-term mitigation in the best interest of students and the university's academic mission is a negotiated resolution that minimises the fact of strike action in the first place. It is a disservice to students, staff, our communities, and our public mission to limp along from strike to strike without comprehensively addressing the underlying issues at stake.

    2.3. Senate asks the university executive, as a matter of academic priority, to concentrate strike mitigation efforts on promoting a negotiated national resolution. Senate believes that publicly leading on this issue, above and beyond the benefits of progress regarding the issues under dispute, has the potential to give Edinburgh an invaluable reputation as a pro-staff and pro-student leader in the sector.

    2.4. As any academic policy changes or exceptions necessarily trade off with the primary goal of promoting a negotiated resolution, Senate expects strike-related concessions to be presented to Senate as a whole for approval, and this supersedes the delegation of authority to Senate standing committees where applicable. As with other matters approved by the whole Senate, it is anticipated that the relevant committee (typically APRC) would develop and approve recommendations; the Exception Committee retains its powers to approve exceptional urgent cases that cannot await full Senate consideration.

    2.5. In recognition of the limitations of national negotiation and the specific pertinence of Edinburgh's high cost of living and the university's large financial resources relative to the sector, our recent university-wide successes in securing income, as well as the cumulative effects of pay erosion in the sector, Senate believes it to be of academic importance that the current university review of pay grades and spine points pursue a significant increase in the reference spine points across *all* pay grades.

2.6. Senate believes that a fair and effective national resolution to the current industrial action should involve the following components, and calls upon The University of Edinburgh leaders to commit publicly to at least these minimum criteria:

    2.6.1.   Immediate pay rises in line with inflation combined with a credible plan to reverse longer-term pay erosion with superinflationary pay rises over the next 5-10 years.

    2.6.2.   A credible and measurable plan to close gender, ethnic, and disability pay gaps.

    2.6.3.   A credible and measurable plan to eliminate precarious employment practices and address excessive workloads.

    2.6.4.   The restoration of pension benefits to the maximum extent possible under a new USS evaluation on the nearest achievable timeline.

Background and context

3. The university has been subject to repeated industrial dispute and strike action in recent years as an outcome of a sector-wide failure to address concerns regarding compensation and working conditions.

4. The University of Edinburgh has consistently had among the highest ballot turnouts and highest votes in favour of industrial action, a reflection of conditions here and of staff commitment to addressing them.

5. Strike action disrupts both teaching and research, lowering the quality of both in the short term in order to promote changes that will benefit both in the long term, if university employers commit to a reasonable settlement.

6. Any national role played by The University of Edinburgh in seeking a positive resolution on these issues to date has not been well publicised. This is a massive missed opportunity for leadership in a sector strongly dependent on reputation and goodwill.

7. Academic Senate has thus far not been directly involved in these disputes beyond (typically via its committees) approving and reviewing local mitigations to strike action. In its August 2022 meeting, Senate agreed in general terms with committee convenors that the issues under dispute should be given more prominence in committee papers, and that recognised unions should have representation on Senate committees. The latter expectation was reaffirmed by vote in Senate's October 2022 meeting. There has been little movement reported on either of these agreements as of this writing.

Discussion

8. The industrial dispute has been widely discussed in and beyond this university and will be familiar to members of Senate. This paper is not the place to sum up the facts and issues in the dispute.

9. Rather, the purpose here is to articulate the obvious Senate interest in these issues and to articulate that this should translate into more direct Senate ownership of the academic dimensions of the university's response to the dispute.

10. Regarding Senate delegation of power and approval of concessions, it is noted that Taught Assessment Regulation 70, typically invoked to justify strike-related exceptions from APRC, refers to disruptions "beyond the University's control" and must in any case prioritise academic judgement and standards. This paper affirms that in an employer-employee dispute the employer cannot reasonably claim that progress toward resolution is beyond its control, certainly not in a way akin to extreme weather and loss of facilities (the examples given in TAR 70.1). Moreover, this paper affirms that local and sectorial approaches to the matters under dispute are rightly included in consideration of academic standards, and it is for Senate to interpret the academic implications of proposed mitigations in that light.

Resource implications

11. The paper advocates actions related to the responsible long-term management of university resources for the sustainability and success of the university and sector.

Risk Management

12. The paper recognises that the only effective mitigation of strike risk and the risks to excellence and sustainability due to degraded compensation and working conditions comes from a durable negotiated national resolution to industrial action.

Responding to the Climate Emergency and Sustainable Development Goals

13. The university's effectiveness in responding to these is directly dependent on the long-term sustainability of the university and sector and its conditions of teaching and research.
14. Good governance of the USS pension fund may correspond to fund management that better respects these priorities.

Equality and Diversity

15. These are core issues of the industrial dispute whose resolution has been largely sidestepped to date.

Communication, implementation and evaluation of the impact of any action agreed

16. Senior management to communicate approach and progress in national negotiation, as well as developments on local conditions including pay scale review. Evaluation to take place via regular quality assurance and review functions of Senate.

Consultation

17. This paper is drawn from national and local conversations over industrial action.

Further information

Author(s)	Presenter(s) (if required)
	To be determined.

Dr Mohammad Amir Anwar

Dr Michael Barany

Prof Jane Calvert

Dr Pau Navarro

Dr Steven Morley

Prof Diana Paton

Dr Uzma Tufail-Hanif

Dr Ingrid Young

Freedom of information

OPEN

SENATE

8th February 2023

Honorary Degrees Withdrawal Procedure

Description of paper

1. This paper proposes amendments to the Honorary Degrees Withdrawal Procedure (the "Procedure").

Action requested / recommendation

2. The paper invites Senate to approve the amended Procedure, which would come into force with immediate effect and applies to degrees awarded pre and post 8 February 2023.

Background and context

3. Senate approved the current version of the Procedure at its meeting on 6 December 2006. The current version is available here:

www.ed.ac.uk/sites/default/files/atoms/files//honorary_degree_withdrawal_procedure.pdf

4. At its meeting on 11 August 2022, Senate agreed to withdraw an Honorary degree, and made some comments about the associated Procedure. The Deputy Secretary Students indicated that she would arrange for a review of the Procedure, to present to a future Senate meeting.

Discussion

5. The Academic Registrar has reviewed the Procedure, and, proposes that Senate replace the current version with the revised one attached as an Annex. These proposed amendments take account of feedback from Honorary Degree Committee members in the context of considering the case that Senate decided on in August 2022, as well as feedback from the University Secretary.

6. The main changes from the current version are:

    *   Making it more explicit that Senate can take account of the Honorary graduands' actions subsequent to Senate agreeing to confer the degree;
    *   When considering whether Honorary graduands' actions run counter to the University's mission and values, the reference point would be the University's current mission and values (that is, those that apply at the point that Senate considers withdrawing an award, rather than those that applied at the point of deciding to confer the degree);
    *   Emphasising that ideological differences with members of the University community is not in itself grounds for withdrawal;
    *   Clarifying the process for submitting a request to review the award of an Honorary Degree, and for deciding whether the Honorary Degrees Committee should consider that request;

- Clarifying the arrangements for communicating the decision to withdraw an Honorary degree; and
- Presenting the Procedure in the University's standard template.

Resource implications

7. These amendments to the Procedure would not have any material resource implications; the work for the Honorary Degrees Committee (or sub-group) and Senate in considering cases for withdrawal of awards would be substantively unchanged.

Risk management

8. Having an effective and appropriate procedure for considering requests for withdrawing Honorary degrees will assist the University to manage reputational and other risks associated with the award and withdrawal of Honorary degrees.

Responding to the Climate Emergency & Sustainable Development Goals

9. Not applicable.

Equality & diversity

10. The University did not undertake an Equality Impact Assessment when it originally developed the procedure in 2006, which predated the 2010 Equality Act. We have undertaken an EqIA on the revised Procedure, which has not highlighted any material equality and diversity issues.

Communication, implementation and evaluation of the impact of any action agreed

11. If Senate approves the revised Procedure, Academic Services will publish it on its website.

Author
Lisa Dawson
Academic Registrar
1 February 2023

Presenter
Lucy Evans
Deputy Secretary Students

Freedom of Information
Open

Honorary Degrees Withdrawal Procedure

Purpose of Procedure

The University expects that the actions and behaviours of Honorary Degree award-holders are consistent with its vision and values and do not impact negatively on the University's work or its reputation. The withdrawal procedure addresses, where necessary, the withdrawal of an Honorary Degree.

Scope: Mandatory Procedure

The procedure applies to holders of Honorary Degrees with recommendations from the Honorary Degrees Committee approved by Senate.

Contact Officer	Name: Lisa Dawson	Role: Academic Registrar	Email: lisa.dawson@ed.ac.uk

Document control

Dates	Approved: TBC	Starts: TBC	Equality impact assessment: 31January 2023	Amendments: TBC	Next Review: 2028-29

Approving authority	Senate
Consultation undertaken	University Secretary, Deputy Secretary Students, Legal Services
Section responsible for procedure maintenance & review	Registry Services
Related policies, procedures, guidelines & regulations	The procedural guide for nominating candidates for an Honorary Degree. The nomination procedural guide is based on University of Edinburgh Resolution No. 6/1972 and on decisions by the Honorary Degrees Committee and the Senate.
UK Quality Code	UK Quality Code
Procedures superseded by this procedure	This is an update to the current Honorary Degree Withdrawal Procedure.
Alternative format	If you require this document in an alternative format please email Academic.Services@ed.ac.uk or telephone 0131 651 4490.
Keywords	Honorary degree, withdrawal, revocation

Procedure Title

The University expects that the actions and behaviours of Honorary degree award-holders are consistent with its mission and values and do not impact negatively on the University's work or its reputation. While due diligence is undertaken on nominated candidates, it is recognised that information may subsequently come to light or events occur which call into question the University's decision to honour an individual in this way. This procedure addresses such situations.

Criteria for Withdrawal
The award of Honorary Degrees will only be withdrawn in exceptional circumstances, where substantive and evidenced information relating to the actions of the individual concerned has emerged subsequent to conferment of the award, which:

- Calls into question the original rationale for conferring the award; and/or
- Runs counter to the University's current mission and values (that is, those that apply at the point that Senate considers withdrawing the award, rather than those that applied at the point of deciding to confer the award) or otherwise undermines its work; and /or
- Risks significant damage to the reputation of the University.

The new information may relate to historical, recent or contemporary events. No person shall be deprived of an Honorary degree of the University, unless Senate, on recommendation from the Honorary Degrees Committee (the "Committee"), has determined there is good cause for that deprivation.

In line with the University's commitment to academic freedom and to freedom of expression [Academic freedom and freedom of expression | The University of Edinburgh](), ideological difference with members of the University community or with the University's stakeholders is not in and of itself grounds for review or withdrawal. There must be a substantive case which explicitly addresses one or more of the criteria above.

Key Principles
The University Secretary is responsible for overseeing the operation of the following procedure, including appropriate record-keeping. The procedure should be completed quickly and robustly, with committee business conducted outside the formal calendar of meetings as necessary, including by written resolution.

Confidentiality must be maintained as far as possible by all parties regarding all stages of the procedure, with the exception of any public statements issued by the Director of Communications and Marketing in consultation and agreement with the Vice-Chancellor and the University Secretary. This includes all relevant committee and full Senate deliberations.

The procedure will not apply posthumously.

The Procedure:

1.   Initiating a review
Requests to review the award of an Honorary degree may be submitted by staff, students or others working under the auspices of the University; or by individuals or organisations external to the University. Proposals must be submitted in writing to the University Secretary. In order to deter vexatious requests, anonymous submissions will not be accepted; however, the identity of the party/parties concerned will be protected as far as is possible and reasonable throughout the review procedure. Proposals must provide substantive grounds for review, supported by appropriate evidence, with reference to the criteria set out within this procedure.

Procedure Title

The University Secretary will screen any proposals for withdrawal of an Honorary degree and shall decide if there is a realistic prospect that Senate, on recommendation from the Committee, would decide to withdraw the Honorary degree. Where the University Secretary judges that this is the case, they will refer the proposal to the Committee for further consideration. The University Secretary will, where appropriate, inform those who originally submitted the proposal of the outcome of this stage.

2. Review procedure

The Committee (or a representative sub-group thereof with a minimum of three members) will review the case with reference to the criteria set out within this procedure. Further advice, evidence and/or verification will be sought as necessary from other members of the University and externally, as needed, with the decision to refer to Senate the responsibility of the Committee.

The Committee (or sub-group thereof), will prepare a draft report on the evidence reviewed and the Committee's findings, prior to making a recommendation to Senate on whether to uphold or withdraw the award. The award-holder will be given the opportunity to respond to the reasons that the University is considering withdrawing the degree within a reasonable time frame.

Having reviewed any submissions from the award-holder, the Committee (or sub-group thereof) will decide whether to submit a formal recommendation to Senate to withdraw the award, with reference to the criteria for withdrawal set out in this procedure. The Committee will submit a final report to Senate for consideration, (i) summarising the evidence reviewed and the Committee's findings and (ii) setting out the formal recommendation, with the submissions from the award-holder and/or other interested parties appended for information. Where the review has been conducted by a sub-group, this information will also be circulated to the full Committee for information.

3. Decision by Senate

Senate will review the report from the Committee and will decide whether or not to approve the report's recommendation. Where necessary, Senate may request further information or exploration of the issue, to be undertaken by the Committee (or sub-group thereof), before making its decision. The decision of Senate to withdraw an Honorary degree is final and there is no right of appeal.

4. Communication of the outcome

On behalf of the Committee, the Secretary to the Committee will liaise with the University Secretary and the Director of Communications and Marketing to identify those who need to be informed of the outcome, and prepare communications accordingly. This may include, where appropriate:

- The award-holder; and
- Those parties who submitted the original proposals for review.

The University's Director of Communications and Marketing is responsible for handling any public statements in consultation and agreement with the Vice-Chancellor and the University Secretary, giving due consideration to the public interest.

Approved: TBC [New – for approval]

Senate

8 February 2023

Membership of Senate Committees – outstanding issues

Description of paper
1. At its last meeting, on 12 October 2022, Senate agreed to ask the Conveners of the three Senate Standing Committees to propose reasonable additions to their Committees to improve Black and Minority Ethnic (BAME), student, and trade union representation.

2. We have considered the proposals carefully, taking advice from relevant colleagues. At least two of the Committees are now large and becoming unwieldly, and we think that Senate should be cautious about adding new membership without removing existing membership. We do not see any case for increasing student membership, or for adding trade union representation. While we do understand the case for amending the membership in order to strengthen BAME representation, further consideration is required regarding the appropriate way to approach this and representation of other protected characteristics. We are not aware of any urgent need to address this issue, and think it would be better to take the time to establish the appropriate way forward.

3. Therefore, at this stage, we are not proposing any additions to Committee membership, or any other forms of action that require Senate's approval, at this stage. Instead, we recommend that Senate waits until the conclusion of the externally-facilitated review before considering any further changes to the Committees' membership in the round.

Action requested / recommendation
4. The paper invites Senate to note and discuss our response.

Background and context
5. At its meeting on 11 August 2022, Senate agreed to the following amendment to the membership of the three Senate Standing Committees:

    "Each Committee Convener is expected to propose for approval by the Senate Exception Committee and/or next Senate Meeting reasonable additions to their committee to improve BAME, student, and trade union representation."

6. We have discussed these issues with the Students' Association, Human Resources, and the University's lead for Equality, Diversity and Inclusion, and our response takes account of their advice.

Discussion

Externally-facilitated review of Senate
7. The terms of reference of the externally-facilitated review of Senate and its Committees include the effectiveness and suitability of the membership of the Committees. The review is currently underway and the findings of the review are to be presented to the 24 May 2023 meeting of Senate. The review may recommend amendments to the membership of the Committees.

Practical considerations
8. Reports on the optimal size of a committee in order to facilitate effective decision-making (requiring active deliberation, communication and cohesion) typically suggests 8 to 15 members as optimal, and that larger committees become unwieldy.

9. As things stand (taking account of the recent addition of three elected Senate academic staff members to each Committee), the Senate Standing Committees have the following number of members:

    *   Education Committee (28 members, including 2 currently vacant places)
    *   Academic Policy and Regulations Committee (22 members, including 1 currently vacant place – plus another 2 currently unfilled places for coopted members)
    *   Quality Assurance Committee (16 members, including 1 currently vacant place – plus another 2 currently unfilled places for coopted members)

10. Feedback from the 2022 internal review of Senate indicates that some Committee members think that the Committees are already too large. They expressed these views prior to the recent addition of three elected Senate academic staff members to each Committee.

11. The size of a committee also has practical and resourcing implications. For example, the larger the committee, the more staff and student time is taken up preparing for and attending each meeting, more time is required for discussion of each item (potentially leading to longer meetings), and more time is required for associated activities (eg induction of new members). In addition, at present, the University has relatively few larger meeting rooms which are equipped for hybrid committee meetings, meaning that further increases to the size of committees may lead to committees having to conduct their business wholly online, which may not assist with effective discussions and decision-making.

12. Given these issues, Senate should be cautious of adding new members to the Committees – any pros in terms of representation may be outweighed by cons in terms of effectiveness of operation. Therefore, were Senate to consider adding some new members, it may need to consider removing some of the current membership, which would need careful consideration and consultation.

BAME representation
13. We agree that the Senate Standing Committees should include a membership that is broadly representative of the characteristics of the broader University

population, and we support the University's commitment to improving the diversity of key University committees.

14. The staff membership on the Standing Committees is composed largely of ex officio members who are appointed on the basis of academic offices that they hold at University, College or School level (for example, Vice or Assistant Principal, Dean) or on the basis of professional services roles (for example, head of a particular department). Where there is flexibility for Colleges or support services to determine who would represent them on a Committee, this is nonetheless limited to a choice of individuals who hold particular offices (for example, choosing one Head of School from within the College), or determining an appropriate delegate for a head of department. In the context, the balance of staff membership on the Committees (whether by ethnicity or other characteristics) is largely the consequence of recruitment decisions made at University, College or School level – and not something that the Conveners' of the Committees can influence. The same broad points apply to student membership. Student membership of the Committees is largely based on ex officio office holders and Students Association staff members in particular roles. Therefore, the most effective way to address the question of under-representation of any particular groups on the Committees is for the University, Colleges and Students' Association to consider the implications for recruitment to these offices.

15. Senate could however consider amending the composition of each Committee in order to create one or more dedicated places for a BAME member of staff or student, or an office-holder responsible for providing a BAME perspective. What may be appropriate will depend on the remit of the Committee, but options could include:

   - Representatives of networks focussing on issues associated with race, or decolonising the curriculum (eg Race.Ed); or
   - School or programme level EDI leads.

16. Given the point about ensuring that we keep committee sizes to a workable level, we should consider the question of EDI representation in the round – for example, considering whether there are other groups that may be underrepresented on the Committees. We plan to undertake further consultation via the EDI Committee, and benchmark how other institutions approach these issues, before making any firm proposals.

17. While we should consider the formal composition of the Committees, we think it is equally important to ensure that the Committees' consultation processes can take account of the views and interests of BME staff (and students) on relevant policy issues. While the majority of respondents to the 2022 internal review of the Committees thought that the Committees were adequately addressing equality and diversity issues, a minority did not agree, and we would like to explore ways to enhance our arrangements. The University's EDI Committee has a potential role here as a consultative forum, where a particular policy may have implications for particular protected characteristics.

Student representation

18. At present, the Standing Committees have the following student representation:

    Senate Education Committee:
    • Vice President, Education
    • PGR representative (currently vacant)
    • Students' Association permanent staff member (currently vacant)

    Senate Academic Policy and Regulations Committee:
    • Vice President, Education
    • Advice Place Manager

    Senate Quality Assurance Committee
    • Vice President, Education
    • Students' Association permanent staff (currently vacant)

19. While we are keen that the vacant places for student representatives are utilised, we are not otherwise aware of any particular reasons to consider that students are not sufficiently represented on these Committees. We have consulted with the Students' Association's Vice-President (Education) and Student Voice Manager regarding the idea of extending student representation on the Committees. While they are committed to strengthening the student voice within University decision-making, they do not support the proposal to add new student members to these committees. In their view, the current student membership arrangements work well. The student representatives on these committees need a significant amount of contextual knowledge and preparation time in order to engage effectively, and the Students' Association are doubtful that it would be practicable to support additional part-time student representatives to fulfil these roles.

20. Given the Students' Association's views, and that we are not aware of any compelling reasons for increasing student representation on these committees, we do not recommend any changes. However, we are keen to work with the Students' Association to continue to strengthen student representation on particular strands of work associated with these Committees, for example particular task groups and sub-committees. This would be more manageable for the student representatives, and aligns with the Students' Association's advice that the inclusion of part-time student representatives is most valuable when conversations are specific and their impacts are tangible. For example, we are in discussions with the Students' Association about enhancing student representation on the Quality Assurance Committee's sub-group that is responsible for reviewing Schools' annual quality – by adding three student representatives (one from each College) to complement the current student representation (the Vice-President Education).

Trade unions

21. While the 2016 Higher Education Governance (Scotland) Act requires the University to include two places on Court for staff nominated by trade unions, it does not stipulate any places on Senate for staff nominated by trade unions. The

business of Senate and, by delegated authority, Senate Committees, focuses on academic matters – not on the employment and working conditions matters which the University's arrangement for consultation and negotiation with the trade unions focus on. In this context, we are not clear about the rationale for considering including representatives of trade unions on the Senate Committees.

22. The University has an agreed <u>framework</u> for engaging, consulting and negotiating with the trade unions, which include the <u>Combined Joint Consultative and Negotiating Committee</u> (CJCNC). If the intention of having trade unions represented on the Senate Committees is to allow formal consultation and negotiation on the decisions that those committees make, that would have implications for the overall framework and the role of the CJCNC.

23. Were one of the Senate Committees to consider a policy issue with direct implications for employment and working conditions, we would engage with the relevant group within that agreed framework in order to consult the unions. In addition, if the relevant Committee has established a task group (or similar) to develop the relevant policy, we could invite the relevant unions to nominate a representative. This is the approach that the Senate Committees have taken in the past. For example, when developing the Policy for the Recruitment, Support and Development of Tutors and Demonstrators, the Senate Learning and Teaching Committee (the precursor to the Senate Education Committee) included a trade union representative on the relevant task group, and then consulted the CJCNC on the policy.

Resource implications
24. Were Senate to agree further additions to the membership of the Senate Committees, this would have resource implications (see paragraph 11).

Risk management
25. Ensuring the Senate Committees have appropriate membership will assist them to manage a range of risks associated with the matters within their terms of reference.

Responding to the Climate Emergency & Sustainable Development Goals
26. Not applicable

Equality & diversity
27. The paper considers issues associated with how the Senate Standing Committees represent Black and Minority Ethnic members of the University community.

Communication, implementation and evaluation of the impact of any action agreed
28. Academic Services would work with us to determine appropriate communication and implementation arrangements for any agreed actions associated with this paper. The externally-facilitated review of Senate, and the annual internal effectiveness reviews, provide suitable mechanisms for evaluating the effectiveness of the membership of the Committees.

S 22/23 3K

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Committee)

26 January 2023

Freedom of Information
Open

Presenter
Prof Colm Harmon

Senate

8 February 2023

Laigh Year Regulations

Description of paper
1. This paper is presented to Senate for approval. Court and Senate are jointly responsible for approving the Laigh Year Regulations.

Action requested / Recommendation
2. Senate is invited to approve the Laigh Year Regulations, provided in Appendix 1.
3. The Regulations will be submitted to Court on 27 February 2023 for approval.

Background and context
4. The Laigh Year Regulations are University Regulations which allow student sabbatical officers in the Edinburgh University Students' Association and the Edinburgh University Sports Union to matriculate as students of the University without (during the academic year concerned) having to fulfil the normal academic requirement of their programme of study.

5. The Laigh Year Regulations are due for review in 2022/23.

Discussion
6. In line with the routine review of academic policies, the Laigh Year Regulations are due for review in 2022/23.

7. Academic Services have reviewed the Regulations and consulted with the Students' Association and Court Services. No changes to the Regulations are being recommended.

8. The annual uprating of stipend payments increase in line with the UKRI Doctoral stipend. In 2022/23 an exceptional increase in the UKRI stipend was made out of cycle and this increase was agreed to be paid to studnets in receipt of a stipend. The annual rate of Laigh Year payments was increased in-year and is reflected in paragraph 3.1 of the Regulation. Thereafter payments will be increased annually by the percentage increase in the UKRI National Minimum Doctoral Stipend.

Resource implications
9. There are no direct resource implications.

Risk Management
10. No risks identified

Responding to the Climate Emergency and Sustainable Development Goals
11. N/A

Equality and Diversity
12. No equality and diversity impacts are anticipated.

Communication, implementation and evaluation of the impact of any action agreed
13. The Regulations will be submitted to Court on 27 February 2023 for approval.

Consultation

14. Academic Services have consulted with the Students' Association and Court Services on amendments to the Laigh Year Regulations.

Further information
Author(s)   **Presenter(s)**
Olivia Hayes
Academic Policy Officer
Academic Services
January 2023

Freedom of information
Open paper

Laigh Year Regulations

THE UNIVERSITY
of EDINBURGH

Purpose of Policy

The document sets out the regulations under which student sabbatical officers may be granted a Laigh Year.

Overview

The Laigh Year Regulations are University Regulations which allow student sabbatical officers in the Edinburgh University Students' Association and the Edinburgh University Sports Union to matriculate as students of the University without (during the academic year concerned) having to fulfil the normal academic requirement of their programme of study.

Scope: Mandatory Policy

The regulations apply to all students intending to apply for a Laigh Year.

Contact Officer	Kathryn Nicol	Academic Policy Officer	Kathryn.Nicol@ed.ac.uk

Document control

Dates	Approved: 07.02.18	Starts: 07.02.18	Equality impact assessment: 30.07.15	Amendments: N/A	Next Review: 2026/2027
Approving authority		Court and Senate			
Consultation undertaken		Students' Association Chief Executive and EUSU Head of Sports Development.			
Section responsible for policy maintenance & review		Academic Services and Court Services			
Related policies, procedures, guidelines & regulations		Code of Practice relating to the Edinburgh University Students' Association www.eusa.ed.ac.uk/pageassets/about/structure/Code-of-Practice.pdf			
UK Quality Code		UK Quality Code Chapter B5: Student Engagement			
Policies superseded by this policy		N/A			
Alternative format		If you require this document in an alternative format please email Academic.Services@ed.ac.uk or telephone 0131 651 4490.			
Keywords		Laigh, sabbatical, regulations			

Laigh Year Regulations

1. **Definition and Conditions**

1.1 The Laws of the Students' Association and of the Sports Union require that all office-bearers must be matriculated students throughout their year of office. The Senatus Academicus has agreed that certain of these office-bearers may be granted Laigh Years, i.e. the office-bearer may matriculate as a student of the University without (during the session concerned) having to fulfil the normal academic requirements of his or her programme of study.

1.2 The Senatus and Court will from time to time, and after considering recommendations from the Students' Association or the Sports Union as appropriate, determine the offices whose holders are eligible to apply for a Laigh Year (the "approved offices").

1.3 In order to be eligible for the award of a Laigh Year a student must, in addition to having been elected to an approved office, be in good academic standing, that is either:

    (a) the student must be a matriculated student in attendance of the final year of a programme of study, and satisfactorily complete the requirements for the award of a degree or diploma of the University, during the session[1] in which the application for the Laigh Year is made;   or

    (b) the student's academic standing must be such that the student would be allowed to continue with their programme of study in the following session if no Laigh Year were awarded.

1.4 The academic concessions associated with the Laigh Year relate strictly to the academic year beginning on 1 August following the assumption of office. No student may be granted more than two Laigh Years under these regulations.

1.5 A Laigh Year office-bearer must remain the holder of an approved office throughout the period of the Laigh Year.

2. **Application**

2.1 An application for each Laigh Year must be made to the University Secretary, in writing, by the student concerned not later than 3 June following election to an approved office, and must be accompanied by a report from the Personal Tutor/Student Adviser or Supervisor on the student's academic standing.

2.2 The Student Adviser/Personal Tutor or Supervisor may be unable to confirm whether or not the student is in good academic standing by 3 June, for example because confirmation is dependent on the successful completion of assessments, including resit assessments, in August. In that event a further report from the Student Adviser/Personal Tutor or Supervisor shall be lodged by the student with the University Secretary by 13 September or as soon as possible thereafter.

2.3 Where a student applies for a second Laigh Year which involves a continuation of the interruption of their programme of study, the application must also demonstrate that a break of that length would be compatible with successful reintegration into the programme, and that no professional body rules or impediments will apply. In that event,

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[1] The session is considered to be the academic year in question and its associated resit examination diet.

a report from the Student Adviser/Personal Tutor or Supervisor shall be lodged on whether a further break from study will be appropriate. Students are advised to seek this confirmation from their Student Adviser/Personal Tutor or Supervisor before putting themselves forward for re-election for a second term.

2.4 The award of a Laigh Year may be approved firmly or provisionally. The award will be firmly approved when the holder of an approved office is confirmed to be in good academic standing. The award will be provisionally approved if a student is not able to meet the academic requirements for the award of a Laigh Year by 3 June following election but may still be able to meet these requirements by 13 September following election.

2.5 When the University Secretary, on behalf of the Court, formally approves an application (firmly or provisionally), they will notify the student by letter (with a copy to the Chief Executive of the Students' Association or the Senior Treasurer of the Sports Union as appropriate). They will also provide a copy to Student Administration and Student Administration will matriculate the student for the next academic session on this basis.

3. **Payments to Laigh Year Office-Bearers**

3.1 Laigh Year office-bearers are paid a stipend monthly from University funds made available to the Students' Association or the Sports Union. The annual rate of the Laigh Year payments shall be £25,927 in 2022/23 and thereafter will be increased annually by the percentage increase in the UKRI National Minimum Doctoral Stipend.

3.2 Should a Laigh Year office-bearer be in receipt of an award for Disabled students allowance from the SAAS, or would be eligible for such an award if domiciled in Scotland, then an equivalent payment may be made upon agreement between the Students' Association/EUSU as applicable and the Secretary to the University Court

3.3 The Laigh Year payments commence from the date on which the student takes up office. Where the Laigh Year has been firmly approved, the payments will end on 30 June following, or when the student demits office, whichever is earlier. Where the Laigh Year has been approved only provisionally, the payments will cease on 30 September or when the student demits office, whichever is earlier, unless the Laigh Year is subsequently approved firmly.

3.4 No Laigh Year payment may be made to an office bearer until they receive notification from the University Secretary that the Laigh Year has been approved.

4. **Obligations of the Students' Association and the Sports Union**

4.1 The Chief Executive of the Students' Association or the Senior Treasurer of the Sports Union as appropriate shall provide a copy of these regulations to each student who accepts nomination for election to one of the approved Laigh Year offices immediately after the nomination papers are lodged.

4.2 The Chief Executive of the Students' Association or the Senior Treasurer of the Sports Union as appropriate shall provide a further copy of these regulations to those elected to approved Laigh Year offices within 3 days of their election.

4.3 No payments shall be made to the holder of an approved office other than those provided for in these regulations.

Approved by University Court, 4 December 2017
Approved by Senate Academicus, 7 February 2018
Minor clerical amendment to 3.1 to update the annual stipend level and update associated terminology, 25 March 2020
Minor clerical amendments made to include reference to the new position of 'Student Adviser' with effect from 1 August 2022

SENATE

8 February 2023

Research Strategy Group report

Description of paper

1. Summary of issues within the scope of Research Strategy Group (RSG) that are relevant to the wider University community. RSG's responsibility for research policy and strategy are directly relevant to the achievement of the following outcomes set out in Strategy 2030

    i. We will see our research having a greater impact as a result of partnership, international reach and investment in emergent disciplines.

    ii. We will be a global leader in artificial intelligence and the use of data with integrity.

    iii. We will have created opportunities for partners, friends, neighbours and supporters to co-create, engage with the world and amplify our impacts.

    iv. Edinburgh will become the Data Capital of Europe. We will deliver inclusive growth, provide data skills to at least 100,000 individuals, and create new companies and solutions for global challenges.

Action requested / Recommendation

2. For information

Background and context

3. Since the last Senate meeting in October 2022, RSG met on 25th October. It will meet on three further occasions in 2022/23: 23rd February, 18th April and 20th June).

4. This report outlines:

•   Key Edinburgh Research, Development and Knowledge Exchange activities

•   UK funding for Research & Development

•   EU research funding and UK Government's Plan B

•   Future Research Excellence Framework and REF202X

Discussion

<u>Key Edinburgh Research, Development and Knowledge Exchange achievements</u>

5. CAHSS researchers and the College Knowledge Exchange and innovation team have a well established reputation for engagement with policy related to UK, Scottish, and devolved governments and legislators as these two examples show. Firstly, Scottish Parliamentary Committee Report on children and wellbeing has made recommendations linked to evidence provided by a group of MHSES researchers. Secondly, CAHSS researchers are part of newly established initiative (PolicyWISE) spanning Scotland, England, Wales, Northern Ireland as well as Ireland which is a network bringing together academics and civil servants to examine key societal challenges post-devolution and post-Brexit. PolicyWISE is

holding a "Wicked Problems" series of events that bring together policy makers, civil servants, and academic expertise across the UK to explore and discuss the selected policy area. Professor Gillian McCluskey (Moray House School of Education and Sport) led the PolicyWISE event on post-Covid educational inequalities.

6 The Centre for Tropical Livestock Genetics and Health (CTLGH) has been awarded a further US$17.4 million of funding to support its work over the next five years in bringing the benefits of research in genetics to livestock production in low- and middle-income countries (LMICs). Building on the success of the first phase of CTLGH's work, the organisation has been awarded US$14m from the Bill & Melinda Gates Foundation and US$3.4m from the UK Government via the Foreign and Commonwealth Development Office (FCDO). Experts at CTLGH's nodes in Scotland, Kenya and Ethiopia will seek to apply insights from research into genetics to enable purpose bred animals that are more productive, healthy, feed efficient and resilient to climatic and environmental challenges, helping the livelihoods of tropical livestock producers. CTLGH's founding partners – the Roslin Institute at the University of Edinburgh, Scotland's Rural College (SRUC) and the International Livestock Research Institute (ILRI) – will focus on research, capacity building and knowledge exchange to leverage partnerships and deliver strategic objectives. The launch of CTLGH's new phase was announced at an event at ILRI's headquarters in Nairobi, Kenya.

7. The Edinburgh Parallel Computing Centre (EPCC) has successfully led a bid for the University to join the Met Office Academic Partnership, a cluster of excellence bringing together eight UK universities to work on advancing weather and climate modelling. EPCC will lead the University's engagement through the appointment of a Met Office Joint Chair, now awarded to EPCC's Michele Weiland. The main focus of the partnership will be on helping the Met Office deliver its next-generation numerical weather modelling system and developing techniques to efficiently exploit any resulting data.

UK and Scottish Government support for Research, Innovation and Development

8. On 17th November the Chancellor gave his Autumn Statement. In it he stated that he would protect the entire R&D budget which means the plan announced in the Spring Statement to increase public spending on R&D to £20 billion a year by 2024-25 stands. Both speeches and policy documents show that the UK Government considers that RDI is one of the four keys to delivering strong economic growth and it is important to maintain investment of public funds. The overwhelming majority of the UK Government R&D budget comes from BEIS but it is important to remember that other UK govt departments do also fund research.

9. The news that the previous funding commitment would be honoured was very welcome. There had been considerable disquiet that with the multiple pressures on public funding as well as the UK Government having made it clear that hard decisions would have to be made that the R&D budget would be cut. In September the Office of National Statistics released its early estimates (using new methodology) of the value of R&D expenditure across the economy. The ONS data showed that R&D expenditure was greater than had previously believed and UK Government's goal of 2.4% of GDP being invested in R&D

had already been achieved. There was concern that this news would mean that the UK Government would feel justified cutting public funding for R&D.

10. The Chancellor confirmed that funding for Overseas Development Assistance will stay at 0.5% of Gross National Income. In January 2021 ODA funding was 0.7% of GNI and was cut to 0.5%. Some ODA funding supports research undertaken by UK based researchers in partnership with researchers in LMI nations. At the time of the UK's government's Spring Statement it had been hoped that ODA spending could return to 0.7% of GNI soon. Instead, the UK Government announced that it intends that ODA spending will remain at 0.5% of GNI for the foreseeable future whilst maintaining ODA spend will return to 0.7% of GNI once the economy is back on a sustainable footing.

EU research funding and UK Government's Plan B

11. In a speech in January, the UK Science Minister announced that the detailed arrangement for UK's alternative to being an Associate member of the EU's research programme, Horizon Europe was with the Prime Minister, Chancellor and other members of the Cabinet for sign-off. It is anticipated that no further information will be released until the UK Government budget (15th March). Officially the UK Government is still hopeful that it would be possible for UK to become an Associate.

12. UK researchers continue to be able to apply for grants across all the Horizon Europe EU programmes. The UK Government has further extended its Horizon Europe Guarantee deadline to opportunities that close on or before 31st March. Edinburgh researchers are actively encouraged to continue to apply across the entire European Research Council programmes. UK based researchers who are successful in applying for a Horizon Europe funding have two options: retain the EU award and move their research activity to research institution in the EU or hand the grant back and receive its monetary value via the UK Government's Horizon Europe guarantee.

13. In recognition of the time it is taking to settle the UK's position in regard to EU Horizon Europe, UK HEIs have been allocated funding to protect research capacity and capability, and to provide stability ahead of a final decision on Horizon Europe association.

Future Research Excellence Framework and REF202X

14. The ongoing review of the Future Research Assessment Programme is now expected to report in May 2023, publishing initial guidance on the shape and timing of the next REF. This information had been expected to be published in January. The FRAP has consulted the sector in several occasions. It is also drawing on information and advice from the REF2021 assessment panels as well as REF Panels concerned with on EDI and interdisciplinary research. The FRAP has also commissioned a number of activities of which one was the recently published report 'Harnessing the Metric Tide'.

15. As to what is known about REF202X, it is understood that potential changes currently being considered by the FRAP include: adjustments to processes for output selection and review; increased weighting of the Environment statement and/or the merging of subpanel statements into one institutional level statement; and adjustments to how case studies are assessed. However, it is not expected that REF202X will involve a fundamental shift in current approaches to panels, or

to grading scale and criteria. The use of the term 'REF202X' is deliberate. Although it is anticipated that the submission date of the next REF will be either Autumn 2027 or 2028, the actual submission date will not be known until late May.

Resource implications

16. None. This report is for information only

Risk Management

17. RSG is always mindful that, being at the leading edge in the creation of knowledge and making a positive difference to society, means also ensuring University staff understand the inherent risks and take sensible measures to mitigate them in line with the University's threefold appetite for risk in respect of reputation, compliance and finances. The Research Ethics and Integrity Review group is key to this.

Responding to the Climate Emergency and Sustainable Development Goals

18. The University's research contributes to the nine UN SDGs listed which relate to the activities of Higher Education Institutions that educate and carry out research, Innovation and Development. RSG is a platform for strategic discussions about the University's research and at its next meeting will be considering not only how Edinburgh's R&D activities can support global efforts to counter climate change but also the need to reduce the carbon footprint of R&D.

Equality and Diversity

19. The RSG Research Culture Working group which reports to RSG has specific objectives of establishing policies and mechanisms to promote a positive research culture at the University of Edinburgh across all stages in an individual's research career regardless of ethnicity, gender and ableness. University Executive will be asked to approve the draft University Research Cultures Action Plan

Communication, implementation and evaluation of the impact of any action agreed
20. RSG membership includes representation from Communications and Marketing as well as having a Research Engagement subgroup. The RSG papers for discussion explicitly asked for information about communication plans. RSG works with its subgroups, the College Research Committees as well as other University committees to evaluate the impact of action agreed and to determine best approach to dissemination.

Consultation

21. None

Further information

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SENATE

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Annex to Research Strategy Group report

Strategic Investment Plan for Research and Innovation

Background

This paper summarises the University's Strategic Investment Plan, a major investment over 2022/23 – 2026/7 to deliver a step change in our interdisciplinary research and innovation. The plan is funded through the increase in our Scottish Funding Council Research Excellence Grant, enabled by our strong performance in REF 2021.

Table 1 summarises the planned investment across the 5 years of funding, as a portion of our core REG allocation.

Table 1: REG Investment and Strategic Investment Plan[1]

	£k					
	2022-23	**2023-24**	**2024-25**	**2025-26**	**2026-27**	**Total**
'Core' REG allocation	81.5	83.6	83.6	83.6	83.6	**415.9**
Strategic Investment Plan	5.6	5.4	5.4	5.4	5.4	**27.2**
Total	**87.1**	**89.0**	**89.0**	**89.0**	**89.0**	**443.1**

The Strategic Investment Plan prioritises investment across five areas, helping us deliver the University's Strategy 2030:

- Attracting **top early/mid-career talent**, thereby building the next generation of world-leading interdisciplinary researchers and innovators. This will enhance our research excellence and funding, innovation and impact, and the diversity of our research community.
- Creating a positive and inclusive **research culture**, positioning the University of Edinburgh as a sector lead, and continuing to attract, diversify and retain the best researchers and innovators.

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[1] The amounts may vary, depending on movement in line with research grants data returned to HESA; and accounting for any potential changes in overall SFC budget for REG aligned with Scottish Government spending priorities. Note the columns may not fully sum due to rounding. Spend from 2027-28 will be considered subsequently in alignment with the development and evolution of the University's R&I ambitions/needs. Note: Each year we transfer £120k - £160k of the REG to SUERC, the Scottish Universities Environmental Research Centre. This is based on our return to HESA of half of SUERC's research income. The total figures in Table 1 are net of this transfer.

- Catalysing cutting-edge **interdisciplinary collaborations** across major strategic themes, notably those falling within the University's 'big three' missions: Data, Digital & AI; Future Health & Care; and Climate & Sustainability.
- Growing **external funding** through accelerating the pipeline of large grants, including boosting industry collaboration and investment, as well as philanthropic funding.
- Maximising **impact and innovation** through industry engagement, commercialisation, community engagement and impact from our research.

Summary of Planned Investments

1. **Attracting Talent** (indicative funding: £20M)

- *Chancellor's Fellows.* At the heart of the plan is a major investment in 60 new Chancellor's Fellows, costed at ~£12M over the 5 years, comprising 44% of the investment. These will be recruited in 2 waves: 30 Fellows to be appointed through a call published in Sept/Oct 2022; and a further 30 through a call in 2023. The scheme will aim to appoint at least 50% female and 20% black and minority ethnic candidates, reflecting our commitment to diversify our research community. The call will be open to both internal and external applicants, and encourage candidates with non-traditional career paths, including with a track record in industry and other relevant sectors. Costs will be covered for 4 years, with the host School/Institute assuming budgetary responsibility from 2027-28, subject to application of normal performance assessment processes.

- *Edinburgh Career Development Scheme.* Complementing the CF appointments, we will invest in a series of postdoctoral fellowships to enhance our EDI and research culture goals, while also building a pipeline of excellent researchers who are well positioned to secure external funding and achieve impact. We are keen to target under-represented groups within their disciplines, including women, ethnic minority researchers, and those from socio-economically disadvantaged backgrounds, who face particular challenges in building research careers. We are supporting three main types of fellowship under this scheme: (1) 1 2-year, Career Launch postdoctoral fellowship; (2) a 3-4 year EDI targeted postdoctoral fellowship; and (3) an innovation fellowship focused on industry engagement and commercialisation of research.

2. **Enhancing Research Culture** (indicative funding: £1.5M)

We will invest in support for our research culture, supporting a number of initiatives around the new Research Cultures Action Plan and enhacing support for early career researchers and EDI in research. We are prioritising two investments.

- *Research Staff Hub posts.* The Research Hub was established in 2020 within the Institute for Academic Development (IAD) to provide support for early career researchers, research staff and postdocs. We propose supporting three new roles in the Hub to promote, catalyse and facilitate the delivery of our new Research Cultures Action Plan. These posts will cover career advice, PI training, and coordination of the Research Cultures Action Plan.

- *Strategic Research Leadership programme*. The Strategic Research Leadership Programme provides training to support the career development and scale of research and innovation in Edinburgh's future leaders, equipping them to lead major bids, forge ambitious networks and partnerships, and lead centres that straddle the Colleges. Building on the previous 2 successful cohorts, we will focus on supporting individuals aligned to our 3 big University-level missions, as well as continuing to offer specific programmes targeted at under-represented cohorts within research and innovation.

3.   Interdisciplinary Collaboration (indicative funding: £1.7M)

We are committed to supporting radically interdisciplinary collaborations to position ourselves for major partnership and bid opportunities. This investment complements further proposed initiatives around preparedness, planning and support for bids (see 4 below).

- *Theme development support*. We will create pooled resource at College level (3 FTE) to provide coordination and administrative support for major strategic interdisciplinary initiatives. This would fill a clear gap in support for new strategic initiatives: support for PIs in convening new research networks, liaising with partners, organising events, overseeing budgets, reporting on KPIs, and brokering other forms of support across different parts of the University.

- *Ideation*. The University will support an annual 'big ideas' call to surface transformative, interdisciplinary projects. While Colleges and Schools already support a range of seed funding schemes, they are not structured to support cross-College initiatives. A University-level scheme would signal a One University approach, and better enable truly ground-breaking ideas to be surfaced and developed.

4.   Supporting Major Bids (indicative funding: £2.2M)

In order to optimise our success in securing big bids, there is a need for more specialised and agile support for developing interdisciplinary major bids and partnerships. An investment in pooled support aligned with our major strategic themes would facilitate enhanced support for research teams/partners, significantly enhancing our preparedness, planning and delivery of major bids to funders. A joined up approach would also allow targeted support for researchers under-represented in the big bids 'space', notably women and those with black and minority ethnic backgrounds.

- *Major bids*. We will invest in a big bids funding team to support: identification, planning and preparation of major and complex bids (>£5M and typically straddling more than 1 College and multiple partners); working with PIs and external partners to project-manage big bids, including coordinating partnerships and drafting sections of bids; ensuring we actively facilitate equality and diversity in the research teams leading such bids; and providing guidance and training to equip PIs to successfully lead such bids.

- *Pump priming of major cross-College initiatives:* A pump-priming fund, overseen through a new major projects governance group, will support early-stage ideas, with high potential to become part of the pipeline of strategically significant major bids (typically >£20M) and key partnerships. Such major bids and partnerships are typically undertaken as part of an agreed University-level strategy (as opposed to the big bids mentioned above, which are a regular feature of School and College grant activity). This fund would be allocated to support major bids, strategic themes or international partnerships, including those identified as part of a new strategic bids governance group. Such support is already frequently provided on an ad hoc basis (for example, for strategic international partnerships, or major funding bids such as Strength in Places); this major initiatives fund would systematise this, and make it subject to clearer governance, oversight and transparency.

5. **Innovation and Impact** (indicative funding: £1.8M)

We plan to enhance professional and academic support for impact across the University, informed by a a systematic review we commissioned of the drivers of impact performance across our REF. This investment will drive stronger performance in the next REF and boost the overall quality of Edinburgh's submission. Investment in impact will also help drive Edinburgh's commitment to developing new strategic partnerships and enhance the reputation and influence of the University across key stakeholders, and within Scotland, the UK and globally.

- Pending further consultation, we anticipate investing in further specialised professional support for impact, potentially operating as a hub and spokes model. We envisage that this team would support impact training, facilitate key external partnerships, ensure appropriate support for impact across Schools, put in place appropriate systems for evidencing impact, and ensure a joined-up approach that links relevant teams supporting impact.

- Complementing this professional support, a Strategic Impact Fund (SIF) would be targeted to address key gaps in current support for impact. The SIF would focus on strategic investment, providing resource to enable the building/consolidation of key partnerships with industry, government and community and third sector organisations. The proposed fund would be further developed based on priorities identified in the impact review.

Governance

More detailed plans on investment across these five areas are currently being developed by the VP Research and Enterprise and Heads of College, reporting to Research Strategy Group and the University Executive. More detailed delivery is being overseen by the Research and Innovation Steering Group (VP Research and Enterprise, College Deans of Research, College Research Managers, Directors of Edinburgh Research Office and Edinburgh Innovations).

All investments will be subject to performance review, building on indicators that are being developed by the Research and Innovation Steering Group.

30th November 2022