

**SHAPING A DESIRED FUTURE FOR  
AUSTRALIAN BUSINESS EDUCATION:**  
*Learning from a successful  
scoping and development project*

*Patrick Boyle  
Q Associates, Sydney, Australia*

*May 2008*

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This work was commissioned by the Australian Learning and Teaching Council Limited.  
ABN 30 109 826 628

**2008**

*Abstract: The ALTC funded Scoping Study in Business Education (Project) was highly successful. It achieved its important objectives and a number of other valuable outcomes for the future of university business education in Australia. It has enhanced the strength of business education networks and stakeholder groups by enabling real collaboration and learning within and across groups. As a result, a wider and more sophisticated network now exists and is well placed to facilitate evolution of learning and teaching in business faculties and programs. In addition, lessons from the management of the Project provide valuable guidance for people who are planning, engaged in or leading educational development initiatives. This case study identifies and briefly describes the main factors responsible for the Project's success. To provide a suitable context, it also provides a synopsis of the Project in terms of its goals, activities and results.*

## **Introduction**

The purpose of this case study is to identify and briefly describe the main factors that enabled the demonstrable success of the Scoping Study (the Project), the major first phase of a more comprehensive initiative, the *Business as Usual Project*.

The Project was initiated by the Australian Business Deans Council (ABDC) through its Teaching and Learning Network (T&L Network) and was supported by funding from the Australian Learning and Teaching Council (ALTC) (then the Carrick Institute for Learning and Teaching in Higher Education). It was implemented over approximately twelve months from late 2006.

Given its context (e.g. complex issues; diverse stakeholders), the Project had an ambitious goal, which is summarised in the Final Report of the Project as follows.

This Scoping Study is a collaborative and inclusive investigation of existing resources, strengths, gaps and challenges that need to be addressed in order to secure sustainable, effective teaching and learning in business faculties in Australian universities.

The *Final Report* (ALTC, 2008) and an external evaluation provided clear evidence that the Project had been successful in achieving this goal. The stand-out evidence of this was the exceptionally high proportion of stakeholders that judged the Project to be of high value.

The *Statement by the External Evaluator* (Boyle, 2007) included a recommendation to the ALTC that a case study of the Project be developed and disseminated to a wider audience. I was pleased to be asked to be the author of this case.

## **Context and Rationale for the Project**

In July 2006, members of the T&L Network of the Australian Business Deans Council identified a number of key issues that were impacting negatively upon learning and teaching in Australian business faculties. Many of these issues were not new and were well known by many in the Business Education (BE) community. The overarching problem was that progress in addressing these issues had been slow, at best. There was a particular concern that there was no shared view, at the national level, of required strategy or priorities for action.

The Network members, principally associate deans ('learning and teaching') in business faculties, were enthusiastic about taking action to address the issues identified, and a decision was taken to develop an application for support under the (then) Carrick Institute's Discipline Based Initiatives (DBI) Scheme. A working group of seven associate deans, lead by Mark Freeman, University of Sydney (and Chair of the T&L Network), developed the application which was approved late in 2006. This group ultimately formed the Project Team.

The issues that drove the conception of the Project are elaborated on in the *Final Report*. As a set, they provide a valuable and typical example of the kinds of challenges faced by curriculum-discipline leaders and academics who are seeking to ensure a positive future for their higher education enterprise and stakeholders. For this reason, these driving issues are summarised briefly below.

### ***External Factors***

A range of external forces and conditions are currently challenging BE stakeholders. These include:

- Softening in demand from international students;
- Changes in technology influencing learning expectations and experiences;
- Increasing competition in the education market place;
- Changing perceptions of the relative worth of business-related degrees;
- Increasing employer expectations about the range of graduate capabilities;
- Internationalisation of the curriculum;
- Pressures to achieve and maintain external accreditation of degrees; and
- Greater accountability requirements for universities (e.g. the Federal Government's Learning and Teaching Performance Fund).

### ***Internal Factors***

Internal issues and conditions were expressed under two overlapping categories; *curricula* and *academic dissatisfaction*.

#### ***Curricula***

- Getting the right balance between 'core' and 'non-core' subjects.
- When and how to specialise (e.g. the nature of the undergraduate degree).
- Integrating effective information and communication technologies (ICT).

*Academic dissatisfaction* (concerns/dissatisfaction amongst university academics)

- High student to staff ratios.
- Shortage of academic staff (particularly with doctoral qualifications).
- Uncompetitive academic salaries (compared with 'industry').
- Increased academic workloads.
- Increasing complexity of student expectations and issues (e.g. e-learning; litigiousness; paid employment while studying).

Serious concerns about these issues and challenges and a strong desire to address them effectively, and with some urgency, provided the context and shaped the rationale for the Project proposal and design.

### **Intended Outcomes of the Project**

The overall aim of the Project was to build on the work begun in an earlier study carried out under the auspices of the Australian Universities Teaching Committee (AUTC). This work had been comprehensive in its identification of the general challenges facing business faculties, but it was quickly becoming outdated. Further, very few of its recommendations had been acted on.

The Project's objectives can be best understood by referring to its main intended outcomes, which were as follows.

- A comprehensive literature review, incorporating findings from previous relevant projects on BE.
- Description of key challenges and priorities for BE in Australia, and sustainable means for addressing them.
- A report to Carrick (now the ALTC) providing findings and recommendations for advancing learning and teaching in business faculties.
- Three project proposals for submission to Carrick to enable collaborative national-level discipline-based initiatives to address the highest priority issues identified by the Project.
- Establishment of a number of constructive relationship networks within and beyond BE stakeholders.

### **Project Strategy**

Examination of the intended outcomes of the Project might suggest that the project logic conceived by the Project Team (i.e. how it was intended to work) was relatively simple. Essentially, information and knowledge would be derived from different sources, using a few different methods, analysed and used to generate findings and proposals for follow-up projects. This basic logic would then provide the essence of a relatively simple *strategy* for enabling achievement of this work. However, the Project Team was determined to optimise the success and value of the Project. This meant that a range of strategic success factors needed to be identified up-front and means adopted to make sure they were in place and operational as part of the overall Project strategy.

The major success factors for the Project are discussed in more detail in a later section. However, four of them are summarised briefly here, because they were such important aspects of the Project strategy, formulated in advance by the Project leadership. These factors were essentially strategic choices about what needed to be done, and how, to ensure the Project's success. They can be viewed as 'designed-in' (or *a priori*) success factors. Collectively, they define the overall Project strategy and illuminate the intended Project logic.

### ***Systematic engagement with key stakeholders***

From the outset, the Project leadership assigned the highest priority to inclusiveness of relevant BE stakeholder groups in the key processes of the Project. Furthermore, engagement with stakeholders was to be ongoing from the early days of the Project, systematically organised, and based on carefully designed two-way communication processes. Stakeholders' values, ideas, needs and judgments were to be taken seriously throughout the Project and would be the key determinants of outcomes.

### ***Ensuring synergies with existing networks***

It would be reasonable to view this factor as being encompassed by 'systematic engagement with key stakeholders'. However, the Project leadership's view was that linking with existing BE networks, in mutually beneficial ways, had the potential to multiply stakeholder engagement effects considerably. The T&L Network stood out as being a particularly important vehicle for maximising Project success, principally because of the advocacy and engagement powers of its members, the associate deans ('learning and teaching') in universities across Australia.

### ***Use of a reflective and recursive modus operandi***

The Project Team adopted an action research methodology as the essence of its operational model. Implementation was to be facilitated through cycles of planning, acting, observing and reflecting; involving stakeholders continually. This *modus operandi* sought to reinforce the value of systematic stakeholder engagement and was viewed as a means for integrating formative evaluation and iterative learning into the overall workings of the Project.

### ***Highly professional project management***

From its conception stage, leadership of the Project, including implementation management, was seen as critical for the achievement of its goals. Essentially, this recognition led to two important decisions. First, the leader of the Project had to be a person with high-level leadership capability who was optimally placed to achieve traction for the Project in the right places. Secondly, the manager of the Project who would have responsibility for day-to-day implementation needed to have a particular set of capabilities and the right disposition. Excellent relationship building and communication skills were considered to be critical for the project management role.

## **The Project in Action**

Project activities are described in detail in the *Final Report*. Because the main focus of this case study is the Project's success factors, only a synopsis of these activities is provided here. In doing this, the emphasis is on some of the important generic features of how the Project was implemented.

The Project was implemented in six phases.

Phase 1: Establishing commitment from reference groups

Phase 2: Reviewing literature

Phase 3: Collecting data

Phase 4: Analysing data

Phase 5: Deriving findings

Phase 6: Disseminating and evaluating

Ostensibly, the approach to implementation suggested by this set of phases is similar to most classical social science research studies. However, there are some features of implementation of this Project that distinguish it from many such studies. Three of these features are particularly noteworthy.

First, the use of an action research methodology meant that phases overlapped and there were cycles within phases. For example, data collection, analyses and derivation of findings occurred continually from phase 2 to 6. In addition, findings emerged from successive analyses within and across phases 3 to 5. Second, key stakeholders were actively engaged throughout, with processes, events and schedules being purposefully designed to facilitate input, sharing of ideas, reflection, learning and collaborative decision-making. Third, disseminating and evaluating occurred across the Project's life. In summary, while the Project was organised and implemented in phases, actions on the ground reflected the Project strategy and the *a priori* success factors outlined above.

The very brief elaboration that follows highlights some of the features of each of the Project's phases of implementation.

### ***Establishing commitment from reference groups***

The Project Team placed the highest priority on engaging and achieving buy-in from key internal and external stakeholders. Obtaining enthusiastic support from the ABDC and its T&L Network enabled the Project to be genuinely national in nature as it resulted in 37 business faculties being involved.

On the external side, leaders and members of national professional, academic and industry associations were included in all relevant stages of the Project, from the original proposal process through consultation, priority setting, and the generation of findings and recommendations.

### ***Reviewing literature***

A relatively comprehensive review of the literature most relevant to the scope of the Project was conducted. In addition to more formal academic literature, major reports of other initiatives were also valuable. Arguably, the two most important of these were the report of the major study sponsored by the AUTC (Cecez-Kecmanovic et al, 2002) and a discussion paper from the Business, Industry and Higher Education Collaboration Council (BIHECC, 2007). As a result of the overall literature review, a wide range of insights and ideas useful for grounding the Project were derived. Importantly, the insights and issues illuminated were perceived to be salient for the range of Project stakeholders. They included: challenges for learning and teaching in BE; funding problems; attracting and retaining high quality teachers; desired BE graduate attributes-skills; and the question of how to optimise take-up of change in educational practices.

### ***Collecting data***

In addition to information derived from the literature review, the ideas, perceptions and judgments of all key stakeholder groups were gathered throughout the Project. Methods used included surveys, structured focus groups, interviews and planned informal interactions (e.g. between the Project Manager and/or Project Leader and participants in various forums).

### ***Analysing data***

Most data analyses occurred from phase 4 onwards. Essentially, analyses sought to distil and refine themes and issues being identified by stakeholders. The Project Team initially used a *grounded theory* approach to identify key issues. An external consultant carried out an analysis of interview transcripts using the NVivo application. The principal outcome of this main phase of analysis was a set of ten themes (e.g. developing generic skills). These ten themes encompassed all of the main issues raised through the consultative process up to this stage.

### ***Deriving findings***

Findings were derived through an iterative process involving the Project Team and ongoing consultations with stakeholders through a range of forums during the last few months of the Project. From the ten key themes, issues were distilled and classified according to their importance and potential for being addressed effectively by the T&L Network. The Project Team developed and used criteria to evaluate issues for inclusion in one of three prospective projects. Encouraged by the external evaluator, the Project Team also identified a series of significant unintended outcomes (e.g. valuable ideas for an expanded role for the T&L Network). Details of the findings and various outcomes of the Project are provided in Chapter 6 of the *Final Report*.

### ***Disseminating and evaluating***

Importantly, the *Final Report* was made available by the ALTC to national and international audiences via its website in March 2008. The ALTC also commissioned this case study.



At the time of writing this case, 'disseminating' for this Project was ongoing and multi-faceted in nature. During the Project per se, stakeholders were not just informed of decisions and other outcomes at important points. They played an integral role in shaping outcomes and communicating about them in their own domains.

When considering dissemination, the line marking the end of the Project can be viewed as somewhat artificial. In a very real sense, dissemination is continuing via 'extension' activities. This is demonstrable in a number of ways. First, discussions and strategy development continue within the T&L Network to ensure progress on the priorities derived by the Project. Second, formal proposals for three substantial follow-up projects have been submitted to the ALTC (April 2008). Third, high level support for addressing identified priorities is if anything increasing. For example the ABDC has committed to providing increased support for the T&L Network's activities. These flow-on results have been enabled by an ongoing approach to dissemination and they also provide a good example of what one aspect of sustainability can look like for educational development initiatives.

The approach to evaluation adopted by the Project Team ensured that implementation was shaped by relevant critical feedback and reflection, and that summative evaluation was carried out and reported on independently of the Team.

## **Results**

Based on clear evidence, the Project achieved a wide range of valuable outcomes. These are comprehensively documented and discussed in chapters 6 to 9 of the *Final Report* and in the *Statement by the External Evaluator*. Here it is sufficient to simply highlight the major results of the Project in broad terms to provide a richer context for discussion of success factors.

It was very tempting to list the results of the Project in order of importance or value, purely as an external opinion. This might have been a sensible thing to do if the list was to include more micro-level outcomes. However, for this document I decided to aggregate the results under three broader outcomes. Assigning or implying importance rankings to these is not sensible, simply because the bases for doing so are uncertain. For example, while the importance of the stakeholder network enhancement enabled by the Project is already clearly evident, the potential future value of this is great, but yet to be determined. Having noted this, all three of the broad outcomes summarised below are very valuable, and stakeholder network enhancement is described first.

### ***Stakeholder network enhancement***

The Project enhanced BE stakeholder networks in a number of ways, and went way beyond forming basic 'networks' (e.g. databases of people used for occasional communication purposes). First, it has initiated more systematic and in-depth dialogues and learning about BE issues. This has occurred between and within existing stakeholder networks (e.g. within the T&L Network). Second, it strengthened the perceived self-efficacy of stakeholder groups (and the broader BE community) by garnering mutual support and developing promising ways forward for addressing issues of concern to these groups. Third, there is early evidence that a new and potentially more powerful level of network is evolving as a result of the Project. This is likely to incorporate, in some organised way, the ALTC, the ABDC, the T&L Network (i.e. all

university business faculties) and a range of networks beyond higher education (e.g. the Business Council of Australia).

### ***Three substantial follow-up project proposals***

Through the iterative consultative process with stakeholders, the Project Team developed three detailed proposals for projects to sustain the momentum created by the Project. There is clear enthusiasm from all key stakeholder groups for these projects and there are early indications that support for them in the form of various kinds of resources will be committed by different entities. Formal proposals for the projects, including cases for funding support, have been submitted to the ALTC.

The proposed follow-up projects, which are described in detail in the *Final Report*, are as follows.

- 1) Building professionally relevant learning and industry engagement in the business curriculum
- 2) Building and assessing the development of generic skills across the business curriculum
- 3) Valuing quality teaching in business education

### ***Valuable learning***

The Project enabled much valuable learning and Chapter 8 of the *Final Report* is devoted to summarising this. Anybody seeking sound guidance on how to maximise the success of a project with challenges similar to this one would benefit greatly from reading this chapter.

For the purpose of this case study, two important kinds of learning warrant being briefly highlighted. First, stakeholders involved in the Project learned from each other about a wide range of current matters concerning BE in Australia. Part of this was gaining better understandings of the current views and challenges being faced by different stakeholder groups. This learning and its perceived value were evident in the data provided to the external evaluator by a significant sample of stakeholders. Perhaps the most valuable learning for the direct Project stakeholders was about the challenges, necessary conditions and positive possibilities for significant enhancement of Australian BE in the future.

The second kind of valuable learning achieved by the Project concerns what it takes to achieve high levels of success in higher education development projects where there are complex elements involved (e.g. disparate stakeholder needs). While there is a vast literature on project management, and its different aspects, it is not so easy to find specific real cases that illuminate why projects in particular contexts are successful. This Project lent itself well to having such a case study developed. Hopefully, it will be helpful for people involved in similar projects in higher education, both in the BE context and in other curriculum-discipline fields.

## **Success Factors for the Project**

Illuminating the main success factors for the Project is the main aim of this case study. Earlier, four such factors were touched on because they were important for a description of the Project's overall strategy. In my view there are seven factors that together explain the success of the Project almost completely. They vary in kind, but some overlap considerably. In this section, the four that have already been discussed briefly will be elaborated on. Three others (1 to 3 below) will be simply identified and commented on briefly, as their influence can be understood without further explanation. There is also a need to limit the length of this document.

### ***1) A significant issue existed to start with***

The original cause or drivers of projects are not commonly viewed as success factors. However, most successful projects start with a substantial issue (problem, need) that key stakeholders in the field of the project see as being important to address. Having a well defined overall issue makes it possible to set relevant and clear goals, as well as engage stakeholders. This was the case with the Scoping Study. The well recognised issue (essentially) was that BE in Australia needs more momentum for development and creative and strategic action if it is to have a successful future.

### ***2) The will and effort of stakeholders***

Ultimately, the Project was successful because stakeholders felt there was a need for action to address its goals, and they invested time and positive energy to achieve them. Academics, students and representatives from professional and industry bodies provided the ideas, observations, deliberations and judgments that underpinned the results of the Project.

### ***3) Evaluation to optimise success***

The Project Team adopted a relatively sophisticated approach to project evaluation, which is still not common in Australia. This approach hinges on seeing evaluation as being *for* the Project, rather than purely *of* the Project. In brief, such a view enables project processes to be designed to achieve operational (success) purposes (e.g. stakeholder buy-in to the goals of a project) at the same time as they serve purposes more related to evaluation (e.g. getting stakeholders' views on what they would value most as project outcomes). In addition, the Team took the traditional formative and summative purposes (and results) of evaluation seriously.

### ***4) Systematic engagement with key stakeholders***

As indicated earlier, the Project leadership made inclusiveness of relevant BE stakeholder groups the highest priority. Engagement with stakeholders was comprehensive and included internal groups (e.g. academic staff and students in business faculties across Australia) and external groups (e.g. Business Council of Australia; CPA Australia).

Importantly, the Project Team's conception of stakeholder engagement went beyond inclusiveness. Choosing an action research methodology as the *modus operandi* for the Project facilitated genuine and ongoing engagement. Project activities were purposefully designed to promote interest in its aim and importance. In addition, activities enabled stakeholder input to the shaping and ownership of its objectives, processes and results.

Based in part on advice from the external evaluation consultant, an important objective of stakeholder engagement, particularly the aspect of listening seriously to people, was to inform evaluation while optimising Project success. Discovery of different views of Project success held by different people (e.g. the kinds of outcomes that would indicate success), is an example of a valuable result of stakeholder engagement for this purpose.

The critical enabler for systematic engagement with stakeholders was effective two-way communication. The Project Team adopted a selective multi-method approach to communication, matching methods to Project phases, purposes (e.g. obtaining feedback on draft stage conclusions) and particular stakeholders. Communication methods included face-to-face interactions, presentations and discussions at different forums (e.g. meetings of bodies such as the ABDC and the BHERT), postings on websites, tailored emails and personal telephone calls (used frequently by the Project Manager).

### **5) Synergies with existing networks**

Effective linking with existing BE networks enabled a major multiplicative effect on stakeholder engagement and buy-in.

The T&L Network proved to be particularly important for optimising Project success. The Network's members recognised the Project's value for addressing its overall agenda and some of the major challenges they were facing in their own faculties and universities.

The Project Team achieved advantages for the Project by linking with other valuable networks in a number of ways, including the following.

- 1) Persuading the members of the T&L Network that the Project would advance and, in a real sense, provide co-leadership for the Network's agenda.
- 2) Ensuring the active support of the ABDC through systematic advocacy and communication about the Project. For this, having the Chair of the T&L Network as the Project Leader was the critical enabler, as this person had built-in opportunities to engage directly with faculty deans at ABDC gatherings.
- 3) Increasing traction for the Project by encouraging T&L Network members to engage positively with the Project through their more circumscribed networks (e.g. Group of 8 Universities; Regional Universities).
- 4) Engaging key representatives of industry and professional associations early in the Project and fostering communication about and input to it through the networks and meetings of these associations (e.g. the Business and Higher Education Round Table meetings).

### **6) Use of a reflective and recursive *modus operandi***

The action research methodology enabled implementation through cycles of planning, acting, observing and reflecting. This way of operating regularly reinforced the value of systematic stakeholder engagement, and demonstrated the respect that the Project

Team held for stakeholders. It also enabled integration of formative evaluation, ongoing adjustment of strategy, and learning into the Project's overall process.

### ***7) Highly professional project management***

Here, the meaning intended for the term 'project management' is a broad one. It encompasses everything from higher-level strategic leadership to the operational management of day-to-day activities. From the conception stage of the Project, having high quality leadership, including implementation management, was seen as critical for success. This meant that the leader of the Project had to be a person with excellent leadership capability and the person who would manage day-to-day operations needed to be selected very carefully. Both roles required very effective advocacy, relationship development, communication, and organisational skills.

It was clear that the Project Leader (Mark Freeman) provided outstanding overall leadership. He was wisely strategic, passionate about the cause of the Project, supportive of team ideas and efforts, and exceptionally energetic and productive in his engagements with influential stakeholders. He also supported and trusted the Project Manager. Not surprisingly, these are the kinds of attributes identified in much of the literature on leadership as being most valuable for both projects and organisations.

The Project Manager (Chris Sykes) also proved to be an outstanding choice for this role. Apart from the necessities of good organisational skills, high productivity and a thick skin, he demonstrated special capabilities that are ideal for complex development-change projects. First, he was highly competent in the chosen implementation methodology, in this case action research. Second, he was committed to and able to establish and utilise very effective two-way communication processes. Third, Sykes demonstrated the ability to think clearly and operate effectively at both strategic and operational levels. This enabled him to achieve a good balance between adhering to important strategic values (e.g. genuine stakeholder engagement) and operational necessities (e.g. efficiency in data collection). Finally, Sykes brought a genuine critically reflective orientation to his work. Throughout the Project, he remained systematically curious and concerned to find out how implementation could be improved to optimise the Project's ultimate success.

## **Conclusion**

The success of the Scoping Study in Business Education was demonstrated by clear evidence of achievement of valuable outcomes; results aligned with its objectives and others that went beyond those objectives. In addition, all key stakeholder groups judged the overall value of the Project to be high.

Understanding why the Project was so successful can be obtained by reference to a set of success factors. All of the seven factors discussed in this case study were important for the success of this Project, and would be valuable in any similar projects. I suggest that three of the factors are critical for success in projects concerned with achieving agreement on direction and priorities for action across diverse stakeholders. Highly professional project leadership and management, systematic engagement with key stakeholders, and establishing real synergies with existing networks (relating to shared concerns or objectives), are all extremely important.

This Project also demonstrated a very important principle and practice for project planning and design. Success factors should not be viewed simply as matters of interest to be considered at the end of a project. To optimise ultimate success, success factors should be considered up-front, at the project proposal and design stages. They can then be 'designed-in', becoming an essential part of project strategy. Used in this way they serve as a guide for project management, including decision making and the design and implementation of activities. For example, if taken seriously, having 'highly professional project management' as an explicit *a priori* success factor has significant implications for the selection of people for the roles of project leader and/or manager. 'Systematic engagement with key stakeholders' prompts the need for project teams to think through, and develop effective goals and means for achieving such systematic engagement.

In conclusion, the Scoping Study in Business Education was highly successful because the people with ultimate responsibility for its implementation, the Project management and team, were thoughtful and strategic about the factors that would increase the likelihood that the Project would achieve what it was established to do. They identified these success factors early, incorporated them in their overall strategy, and ensured that all important Project activities were shaped by and reflected them in practice.

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## Acknowledgments

This case study was made possible by the creative and dedicated work of the Project Team and the many people who contributed to it. They deserve special acknowledgment. Chris Sykes and Mark Freeman, University of Sydney, were open and generous in providing further information on the Project and I appreciated this greatly. My thanks also go to Sandy Kinch and Elizabeth McDonald, ALTC, for enabling a smooth process for development of the case study.

*Patrick Boyle*  
*Q Associates, Sydney, Australia, (patricqa@gmail.com)*