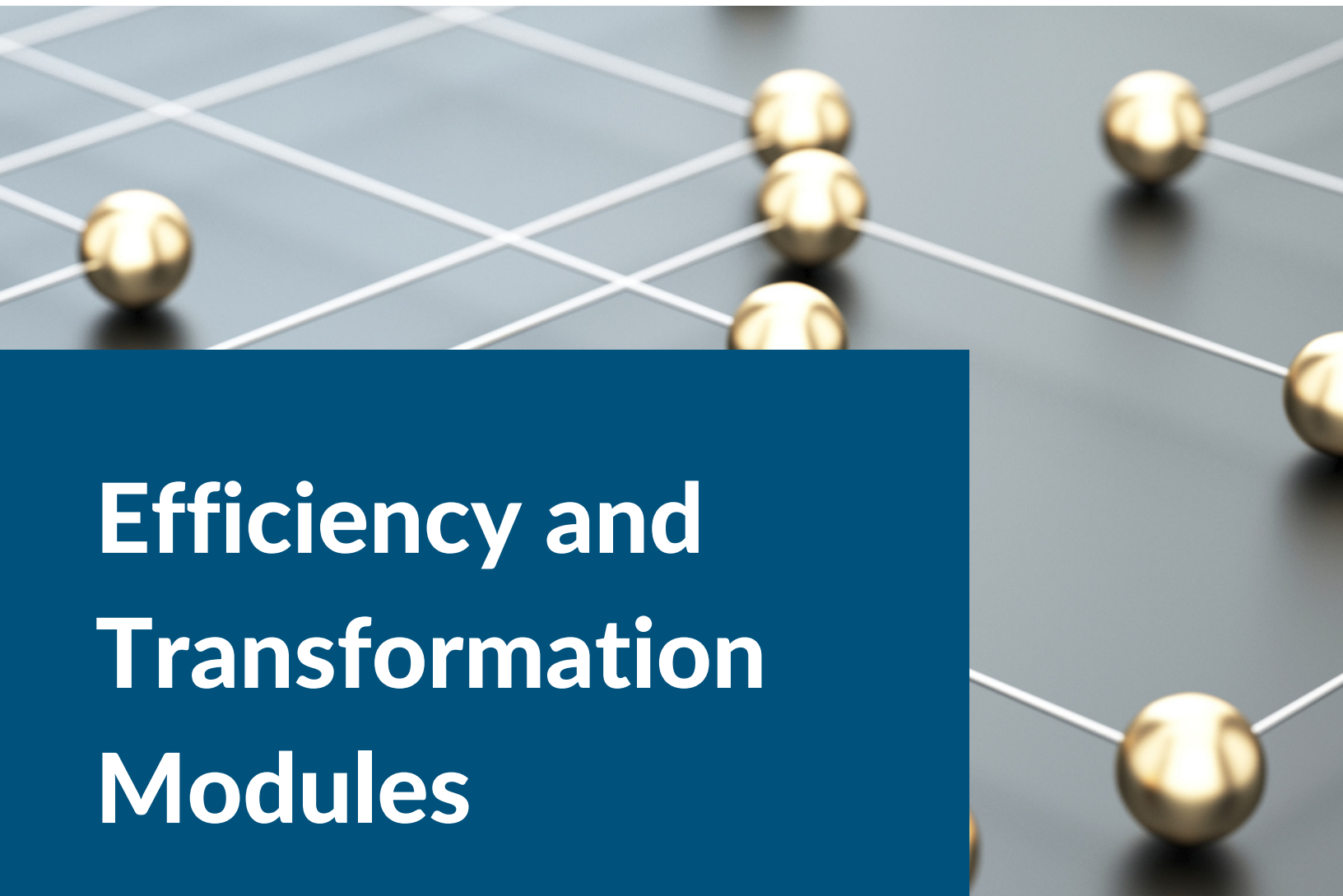


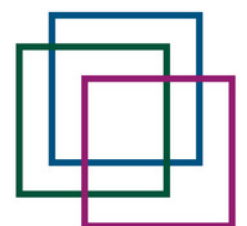
IS YOUR UNIVERSITY FINANCIALLY  
FIT FOR THE FUTURE?

SUMS  
Consulting



# Efficiency and Transformation Modules

Save money and achieve operational excellence with our bespoke efficiency modules. We will help evidence where to make change and reduce cost - in ways that don't compromise your strategy or values.



**SUMS** group  
SPECIALISTS IN HIGHER EDUCATION

# DIAGNOSTIC ANALYSIS & BENCHMARKING

What are your issues and how do you  
stack up?



You will receive a **bespoke, objective and confidential review of your university's staffing cohort**. We'll analyse multiple data sources, many of which are accessible only to the SUMS Group, to form powerful conclusions around the following key questions:

- 1. Is your operating model structured in a way that derives the greatest value?*
- 2. Is the cost of your professional services areas justified, proportionate and aligned to relevant benchmarks?*
- 3. Where are the biggest identifiable opportunities for recurrent cost saving that won't damage your strategic goals?*

## What will you gain?

- New layers of insight to help you challenge long-standing assumptions and guide future decisions about where to reduce spend and where to re-invest for maximum strategic impact.
- Bespoke comparisons of your resources and the ROI you're getting for your spend compared to genuinely comparable institutions.
- Clarity around multiple areas of potential recurrent cost savings – usually upwards of £5m for an average-sized university and it can be considerably more.
- An evidence base to help you decide where to make targeted cost reductions rather than risk damaging your operational effectiveness with blanket cuts.

**"SUMS HELPED US WORK  
THOUGH WHERE WE COULD  
MAKE EFFICIENCIES WITHOUT  
CUTTING WHO WE ARE."**

HELEN GALBRAITH,  
ACADEMIC REGISTRAR AND SECRETARY  
KEELE UNIVERSITY



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# TARGET OPERATING MODEL & ORGANISATION DESIGN

What's the right target operating model for your university?



Clients will receive an optimised and future-proofed operating model, using sophisticated organisation design techniques to move towards modern, flexible and fleet-of-foot provision. We'll conduct qualitative and quantitative analysis using best practice principles from elsewhere in the sector – UK and overseas. Together, we'll develop an appropriate vision, design principles, capability maps, performance assessments, TOM blueprints and a transition plan to move you seamlessly from 'as is' to 'to be'.

## What will you gain?

- More cost-effective delivery of better services.
- The freeing-up of management time by providing absolute clarity about what your university does (and will do), how it does it, and what the parameters are for when activity is supported or stood down.
- A method of delivering transformative change that promotes widespread buy-in from staff as opposed to the blunt 'top-down' tools.
- Creation of an incontestable baseline so you can legitimately evidence, following the implementation of your new TOM, what the positive impact has been across a range of performance dimensions.
- A full understanding of the capabilities you need your staff to have in the decade ahead rather than the decade that's just gone, along with knowledge of how to recruit those staff and how to better manage the performance of your existing cohort.

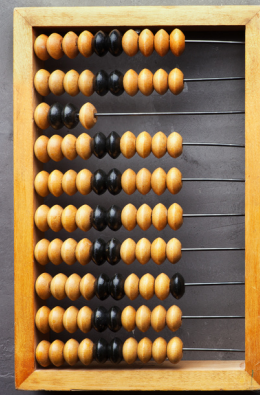
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# PROCUREMENT VALUE ASSESSMENT

How can you squeeze more out of  
your non-pay spend?



**Best estimates are that average organisations suffer a loss of 9.2% of their spend through poor process. The Procurement Value Assessment (PVA) is your essential tool for driving savings in your non-pay expenditure.** The PVA blends an unparalleled understanding of university procurement best practice with detailed qualitative and quantitative analysis of your University's non-pay spend to create unique insights.

The PVA process uses tried and tested procurement opportunity assessment techniques and embeds them in a detailed understanding of the higher education context. We analyse and benchmark your spend at category and sub-category levels to identify potential improvements through aggregation, rationalisation and better compliance. We then undertake a detailed Opportunity Assessment by considering your spend data against critical benefit levers, looking at demand, supply and total cost.

## What will you gain?

- Application of the SUMS assessment at universities has identified an average of approximately £2m in potential savings.
- Demonstration that your institution is tackling non-pay efficiencies prior to (or at the same time as) proposals for staff savings.
- Recommended improvements to processes, structures and training to get the most out of your existing resources, and where relevant, a business case for investment in your team or technology to reap rewards longer-term.
- A realistic and actionable Savings Delivery Plan, prioritising the key areas to focus on for the greatest savings and quick wins.

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# PROCESS OPTIMISATION

How do you become more lean?



Research suggests that identifying tasks that ‘do not add value’, finding what drives them, and eliminating them from processes can deliver up to 20% time-saving. Our approach to process optimisation involves working with you to map processes, identify wasted effort and define process elements that can be run more efficiently and/or effectively. Where processes cut across service areas, this work also promotes greater understanding of inputs, outputs and outcomes from process steps, which in itself helps to enhance the experience of people involved in, or impacted by any elements of the process.

SUMS’ expert practitioners will tailor their support to your needs - whether that’s engagement through Rapid Improvement Events (RIEs) with the knowledge that no new investment is available, or detailed, implementation of reengineering proposals spanning new technology platforms and enterprise-wide adoption.

## What will you gain?

- While efficiencies may not always be translated into cost savings, it does mean that resources can be redeployed to more value-added activity.
- The potential for a significantly improved customer experience following process optimisation.
- Full process maps: Starting with ‘As Is’ and providing an in-depth assessment of hot spots of inefficiency and/or ineffectiveness (red and amber process clusters), and a prioritised action plan to address areas of improvement and transition to ‘To Be’ processes.
- Action plans that identify any specific tools required to replace non-value-added tasks.

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# CHANGE MATURITY ASSESSMENT

How can you encourage excellence in people change management?



A robust approach to people change will increase the likelihood of achieving the expected long-term benefits from your efficiency and transformation programmes. *People change management* incorporates organisational tools to help individuals make successful personal transitions that lead to the adoption of change and the realisation of associated benefits. People change is critical to the success of any programme or project.

Our approach to assessing change maturity **focuses on the 'what' not the 'how'**. We recognise that individual institutions will adopt different approaches (the 'how') based on their current needs and culture. We assess change maturity against **the dimensions of leadership, people, process, focus and approach**; this covers the strategy and planning phases, through to implementation, embedding and sustaining.

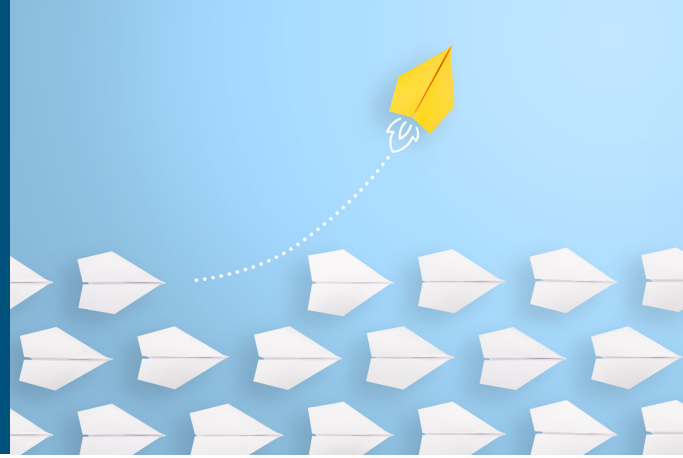
## What you will gain?

- A benchmark against which to measure institutional or departmental progress on your change journey.
- An increased likelihood of achieving long-term and impactful changes through your transformation activities.
- A holistic assessment that puts you in the best place possible to move forward.

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# CHANGE AND ORGANISATION DESIGN - CAPABILITY BUILDING

How do you align and embed the capabilities that support your strategy?



The aim of this module (which is an element of change maturity) is to increase confidence and capability of change agents within the institution. We will enable your team to **engage and coach staff impacted by change resulting in increased commitment** to implementing the required change in their day-to-day work. Our approach will include workshop activity which will cover practical recommendations to reduce resistance to change, and techniques to promote awareness, acceptance and personal action planning.

## What will you gain?

- Increased likelihood of embedding changes in behaviour and attitude, resulting in the realisation of long-term benefits from your efficiency and transformation programmes.

***"IT'S HARD TO IMAGINE WHERE ELSE YOU WOULD GET SOMETHING AS USEFUL AS THE SUPPORT FROM SUMS. YOU DON'T HAVE TO WASTE TIME EXPLAINING HOW THE HE SECTOR WORKS. THEY ALREADY KNOW THE EXTENT TO WHICH UNIVERSITIES ARE DIFFERENT."***

RACHEL STEWART  
DIRECTOR, PLANNING AND STRATEGY OFFICE (PSO)  
UNIVERSITY OF READING



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# EXECUTIVE COACHING AND FACILITATION

How do you support for more  
effective leadership?



In the context of Efficiency and Transformation Programmes, we have customised our already tried and tested approach to Executive Coaching to develop a module aimed at sponsors and leaders of change.

This module uses coaching techniques to enhance the effectiveness of sponsors and leaders of the change. **Experienced coaches will support, encourage, and act as a critical friend.** Delivered through confidential one-to-one discussions, our Executive Coaching module will help to clarify the sponsor's role and responsibilities, navigate barriers, identify priorities and quick wins, and act as a sounding board. Additional coaching support can be provided to teams of people if that's the support you University needs.

## What will you gain?

- Enhanced working relationships, increased confidence and resilience resulting in more effective management and leadership through and beyond change.

***"SUMS HAS BEEN A CRUCIAL PARTNER  
IN STAFF DEVELOPMENT FOR THE  
PROFESSIONAL STAFF IN THE OXFORD  
HUMANITIES DIVISION. ITS TAILORED  
SERVICE HAS BEEN HIGHLY  
EFFECTIVE..."***

LYNNE HIRSCH  
DIVISIONAL REGISTRAR AND HEAD OF ADMINISTRATION  
HUMANITIES DIVISION, UNIVERSITY OF OXFORD



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