

# The Lean, Mean, Delivery Machine

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Being efficient across  
your University

# A 'perfect storm' for universities

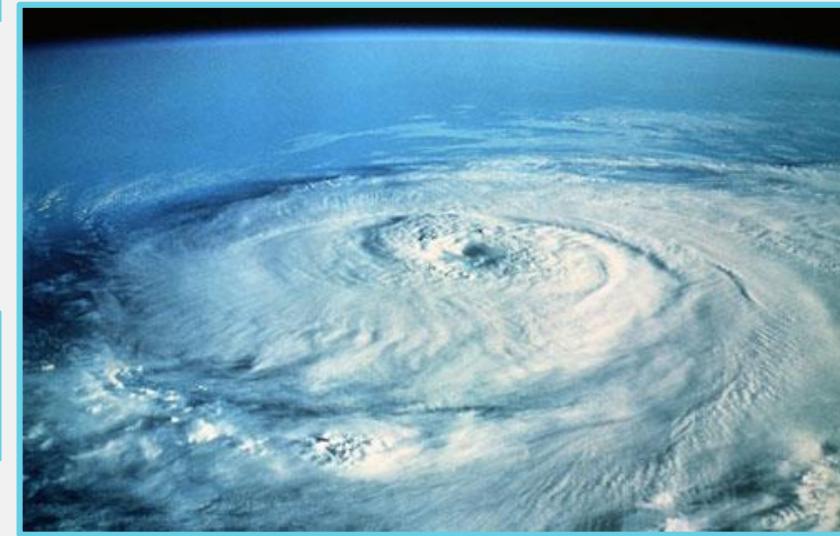
UG demand decline and demographic nadir

Multiple impacts of BREXIT

Change in role of Governance

Fear of the unknown

Media attacks: VC pay, VfM, Grade Inflation



Political pressure to cut UG fees

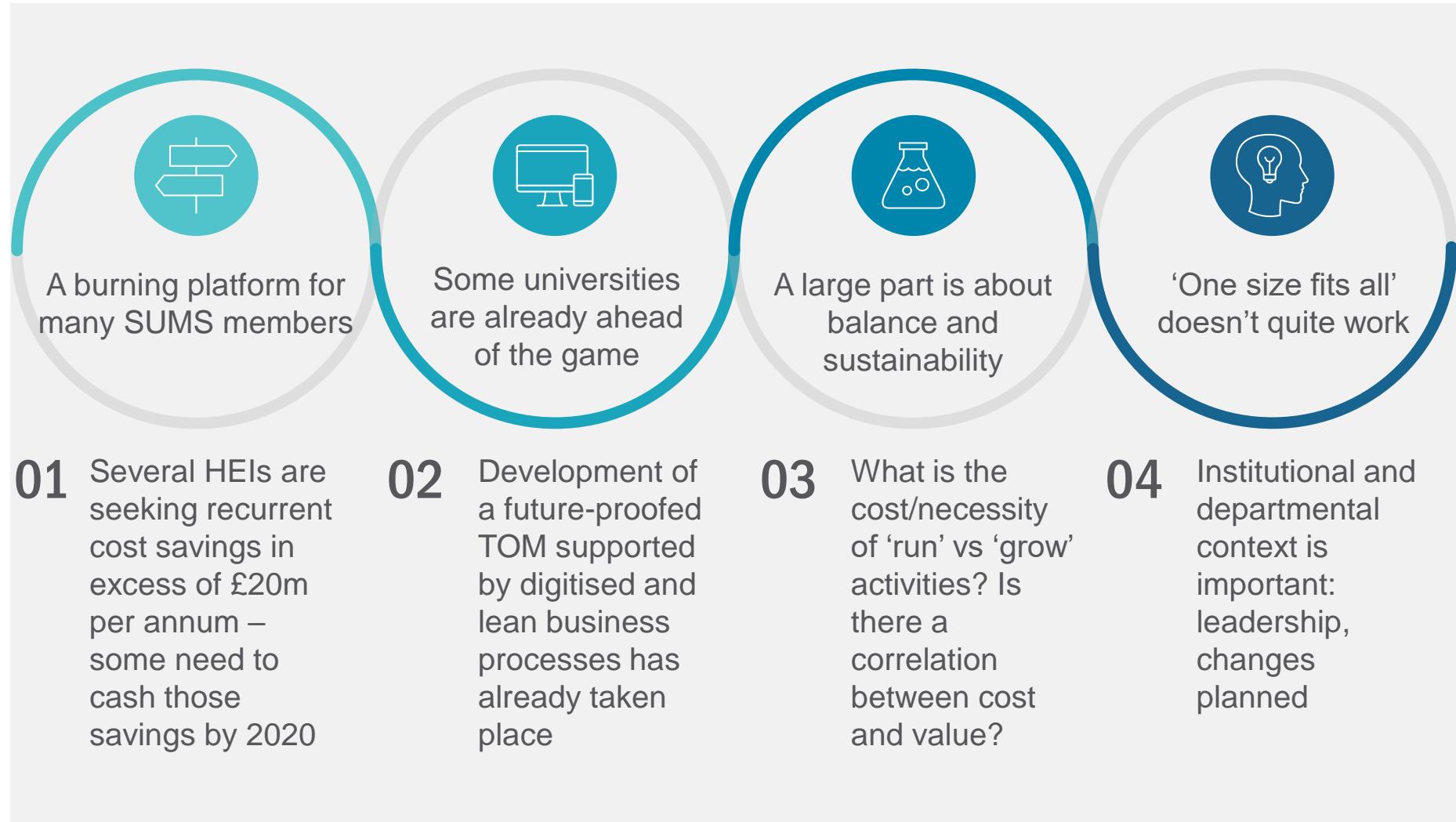
Significant pension cost rises

Shifting visa regs means international SR uncertainty

Marketisation: Private providers, DA's, overseas competitors

Rise in regulation: REF, TEF and KEF

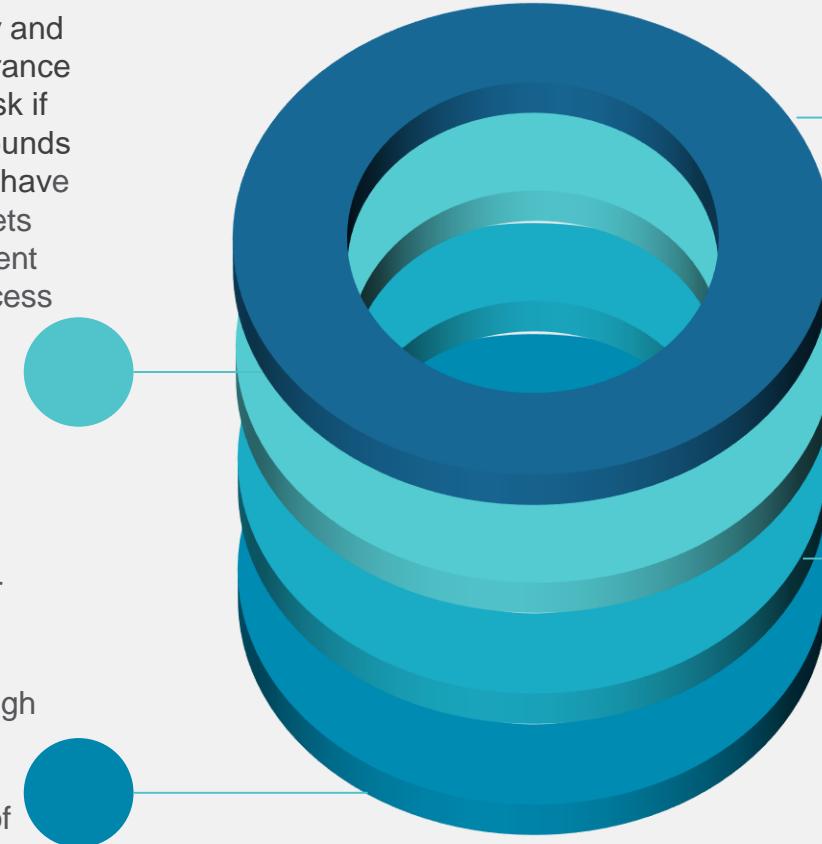
## How is this impacting SUMS members?



# How are SUMS members addressing their cost pressures?

## Obvious options

- Voluntary Redundancy and Mutually Agreed Severance exercises – but high risk if you've had previous rounds of cost-savings or you have high cost savings targets
- Removal of management layers and tackling excess 'pyramid' structures
- Outsourcing/ collaborations
- Closing locations



## Processes

- Major focus on higher levels of maturity in procurement
- The streamlining of high potential business processes
- Increasing numbers of Stop-Start-Continue events

## Service Delivery

- A clear move away from multiple points of administration to consolidated provision managed through a professional service
- Development of genuine 'One Stop Shops' with first and second-line support

## Systems & Technology

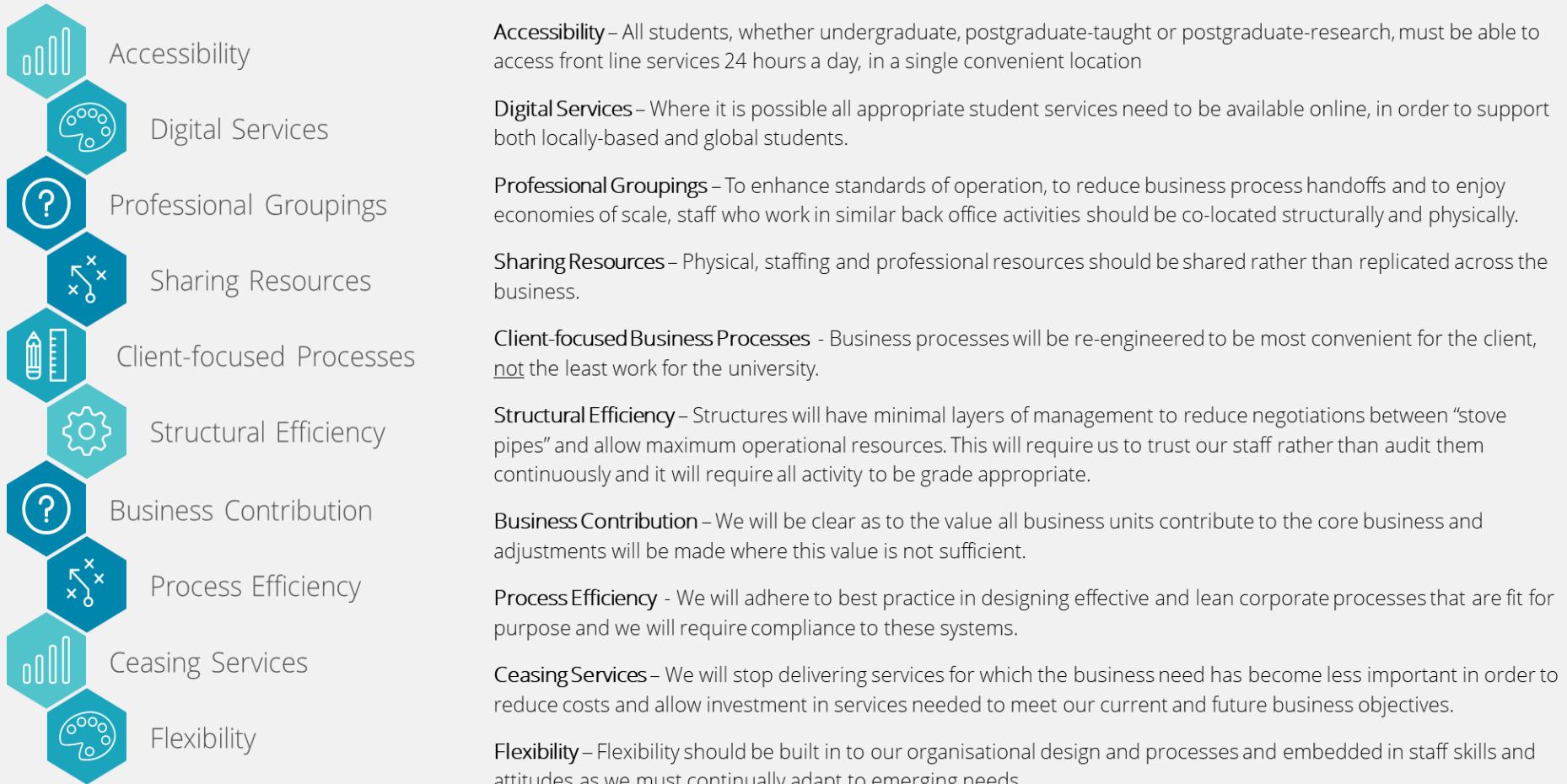
- Data-led decision making (i.e. internal and external benchmarking)
- Investment in/modernisation of IT systems and associated upskilling
- Cutting deeper in order to re-invest in digital excellence

# A modular approach to help your University

- Diagnostic analysis
- Financial benchmarking
- Operating model analysis
- Business process optimisation
- VfM Procurement assessment
- Change maturity assessment
- Change team capability building and support
- Executive team coaching and support

# Design principles to guide professional services restructure

To help guide process and structural redesign, we have set out key design principles to frame the consideration of the operating model :



# Sustainable change: working *with* you, not doing it *to* you

- We typically work with internal management teams, to help both identify and implement savings, and find opportunities to grow and diversify income
- Our members see us as ‘objective insiders’:
  - of the sector, with a deep understanding of how universities are run
  - yet able to bring the objective perspective
- We recognise how important it is that you own your change programme, for staff buy-in and sustainable effectiveness
- We don’t send in a big team, fix things, then walk away. See us as your trusted partner for the longer-term, both guiding you through it and playing backstop

1999/2000  
in retail

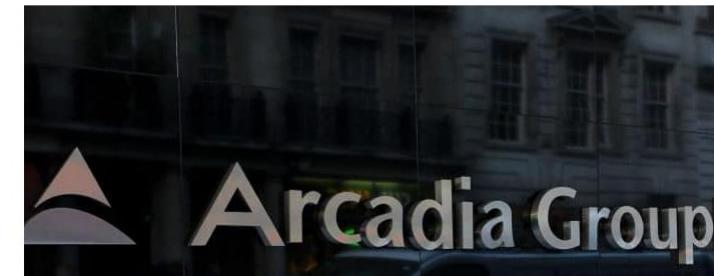
**ARCADIA ANNOUNCES 'BRANDMAX' PROGRAMME TO RETURN GROUP TO PROFIT**

John Hoerner, the group's Chief Executive, commented that "the whole sector is experiencing profound structural changes driven by a decline in the market, increased discounting and the rising cost of space"

2017/2018 in  
retail...

## Profits & sales dive bomb at Sir Philip Green's retail empire

By Elias Jahshan — May 16, 2018



1. Do be guided by data to stay ahead of the competition
2. Keep pace with changes in market conditions!

## 2004/2005 in local government

### Councils see a struggle to hit efficiency targets

| 29 Jul 04

Local government leaders are painting a gloomy picture of their ability to meet Sir Peter Gershon's efficiency targets, predicting inevitable service cuts and council tax hikes.

30 July 2004

Local government leaders are painting a gloomy picture of their ability to meet Sir Peter Gershon's efficiency targets, predicting inevitable service cuts and council tax hikes.

L  
S  
E  
R

1. A burning platform can sometimes be helpful

2. Efficiency doesn't need to result in reduced performance

## 2018/2019 in local government

### Austerity's £18bn impact on local services

FT analysis reveals local government welfare system creaking under weight of growing demand

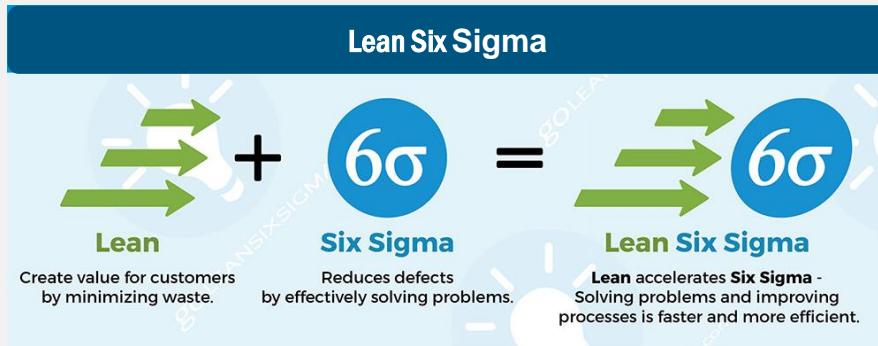


Sally Gainsbury and Sarah Neville JULY 19 2015

116

Local authorities have scrapped access to vital services for 150,000 pensioners and cut child protection spending by 8 per cent since 2010, as cash-strapped councils scramble to cope with George Osborne's austerity drive, analysis by the Financial Times has found.

# When crunch time comes, every university has an array of cost reduction options



Align your costs to strategic priorities

Outsourcing

Procurement VFM

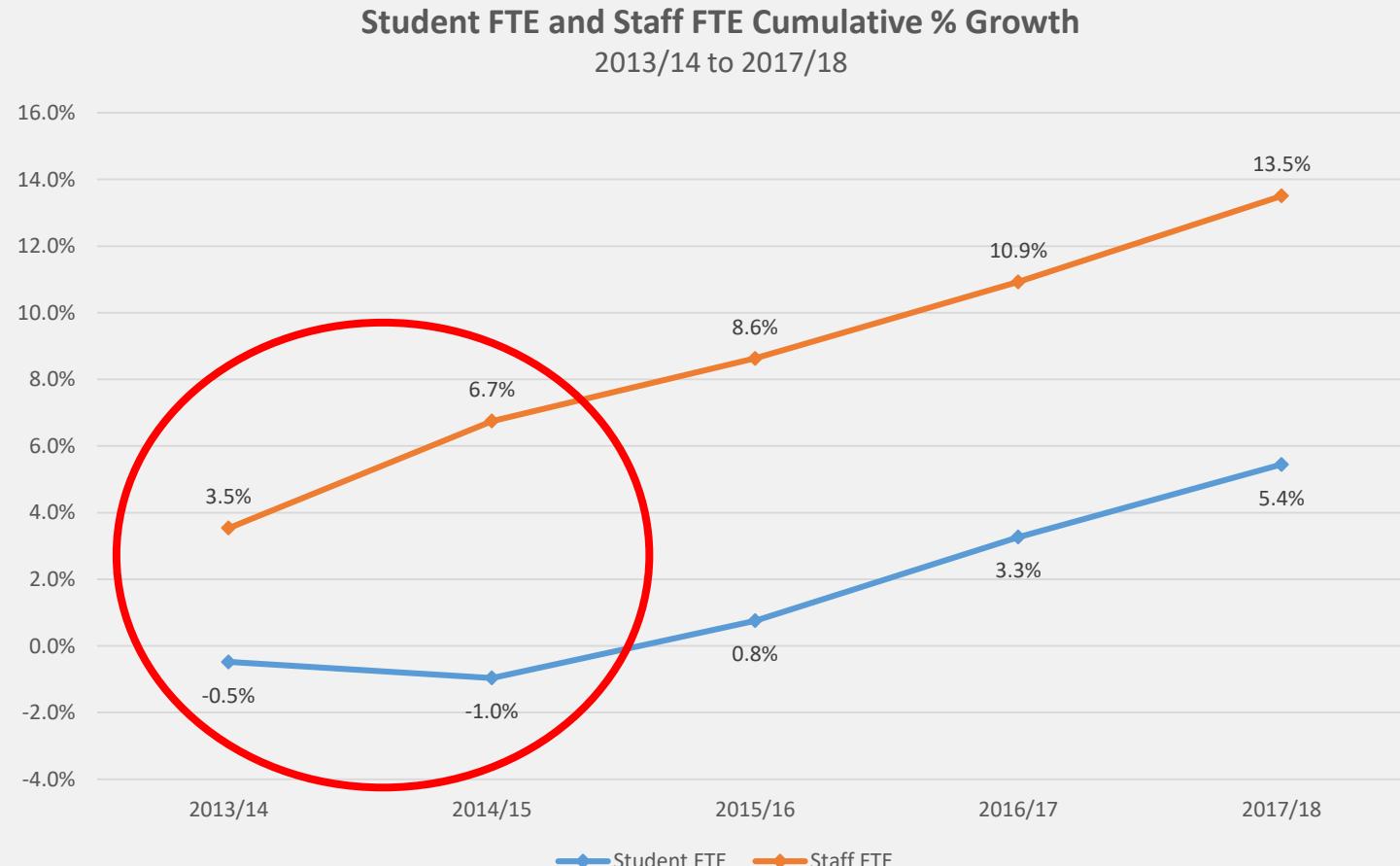
Target Operating Model redesign

Headcount reduction

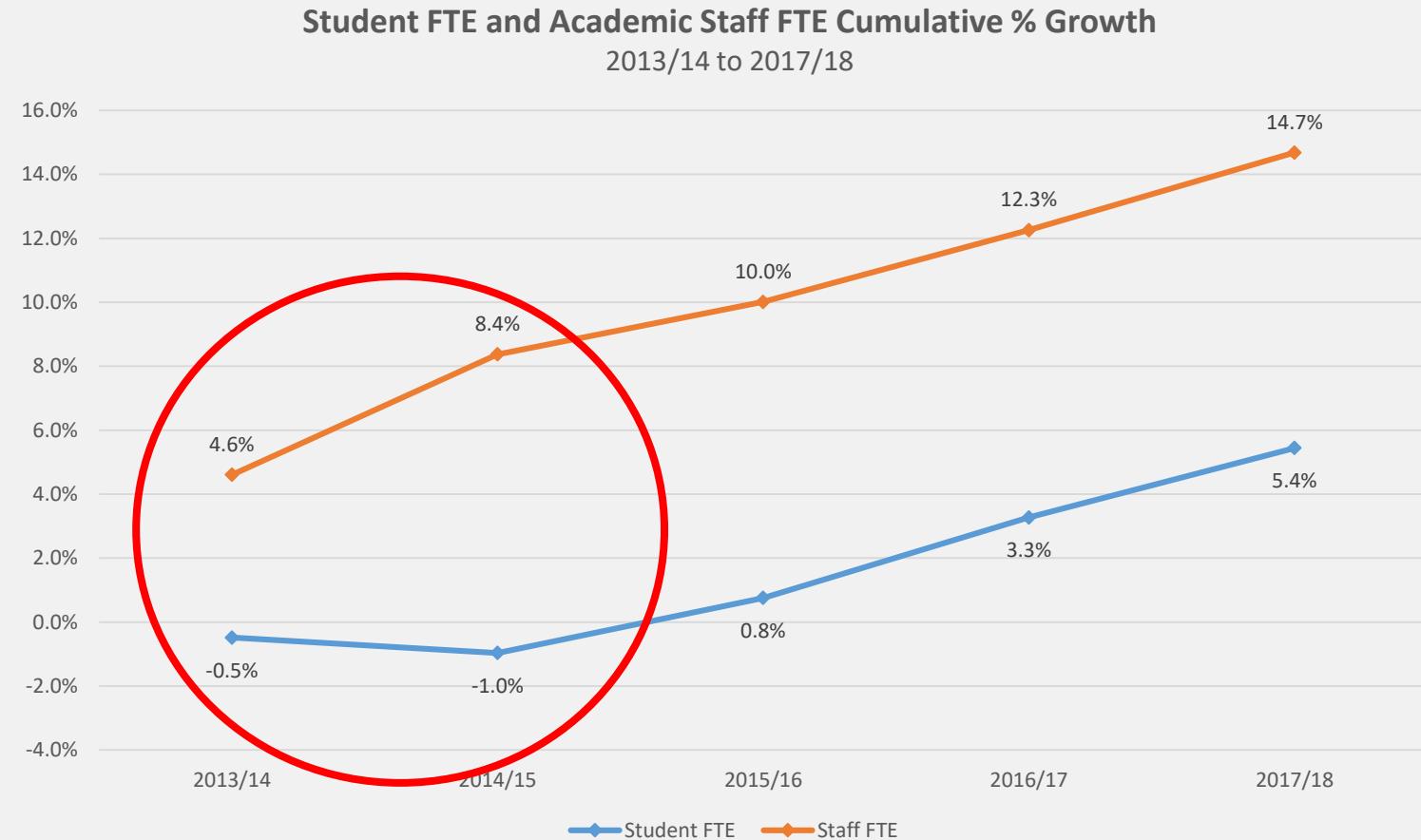
Cost reduction - Priority Based Budgeting and Zero Based Budgeting

PBB provides a structured, evidence based way to identify cost and prioritise resources within a defined envelope

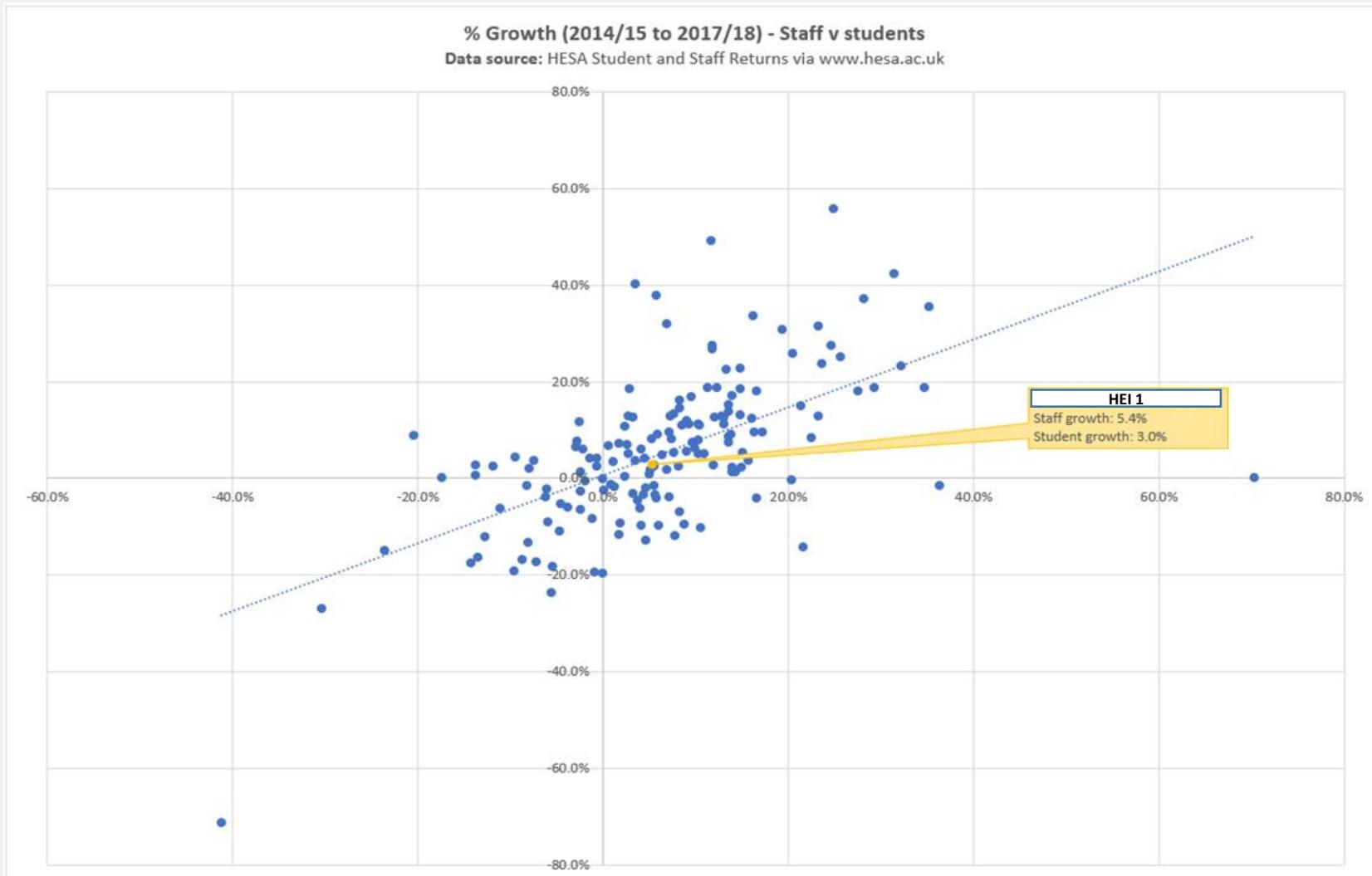
**When it comes to staff and student numbers, the sector data makes interesting reading...**



# Do you know how this trend looks for your own institution?



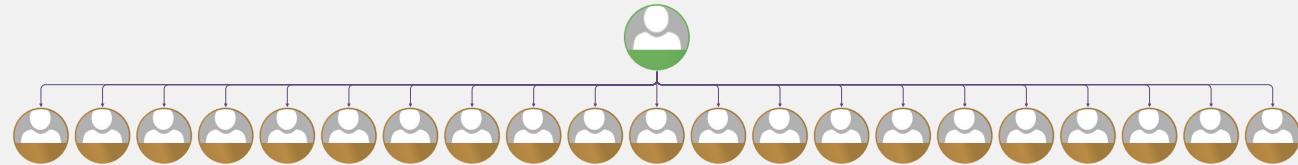
There are different ways to visualise, analyse and compare your performance...



Do you look like  
this?



Or this?

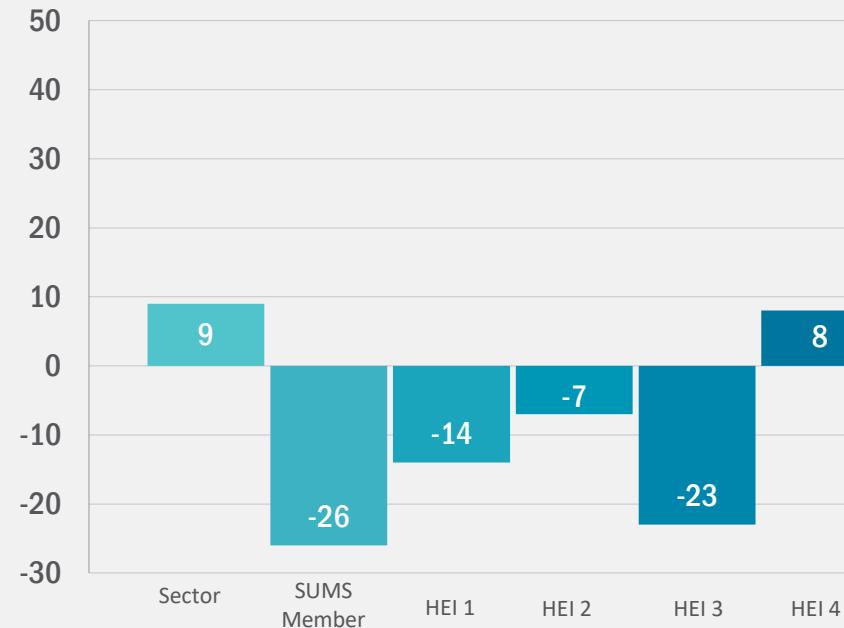


- Is one right and the other wrong?
- What has Sums analysis revealed when we've looked into it in greater detail?

# What other data do we analyse to start putting together a 3D picture of the opportunities?

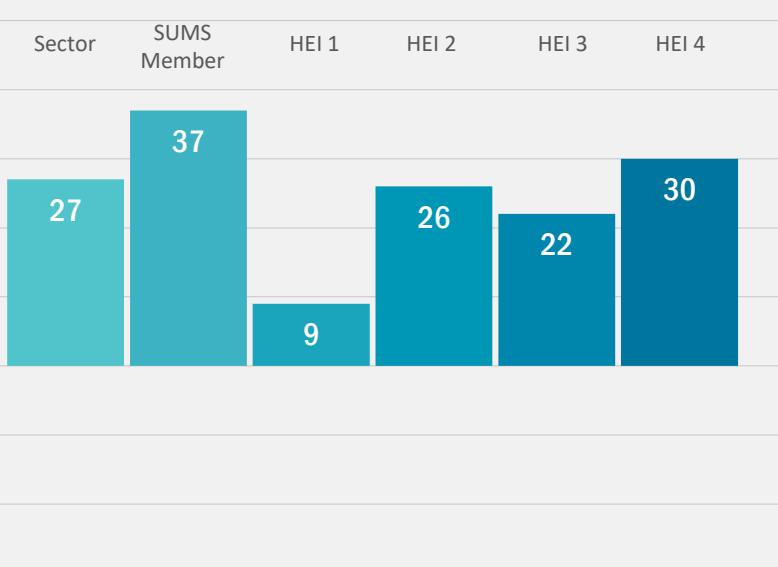
## Contract Salary

> £18,777 and <  
£24,983

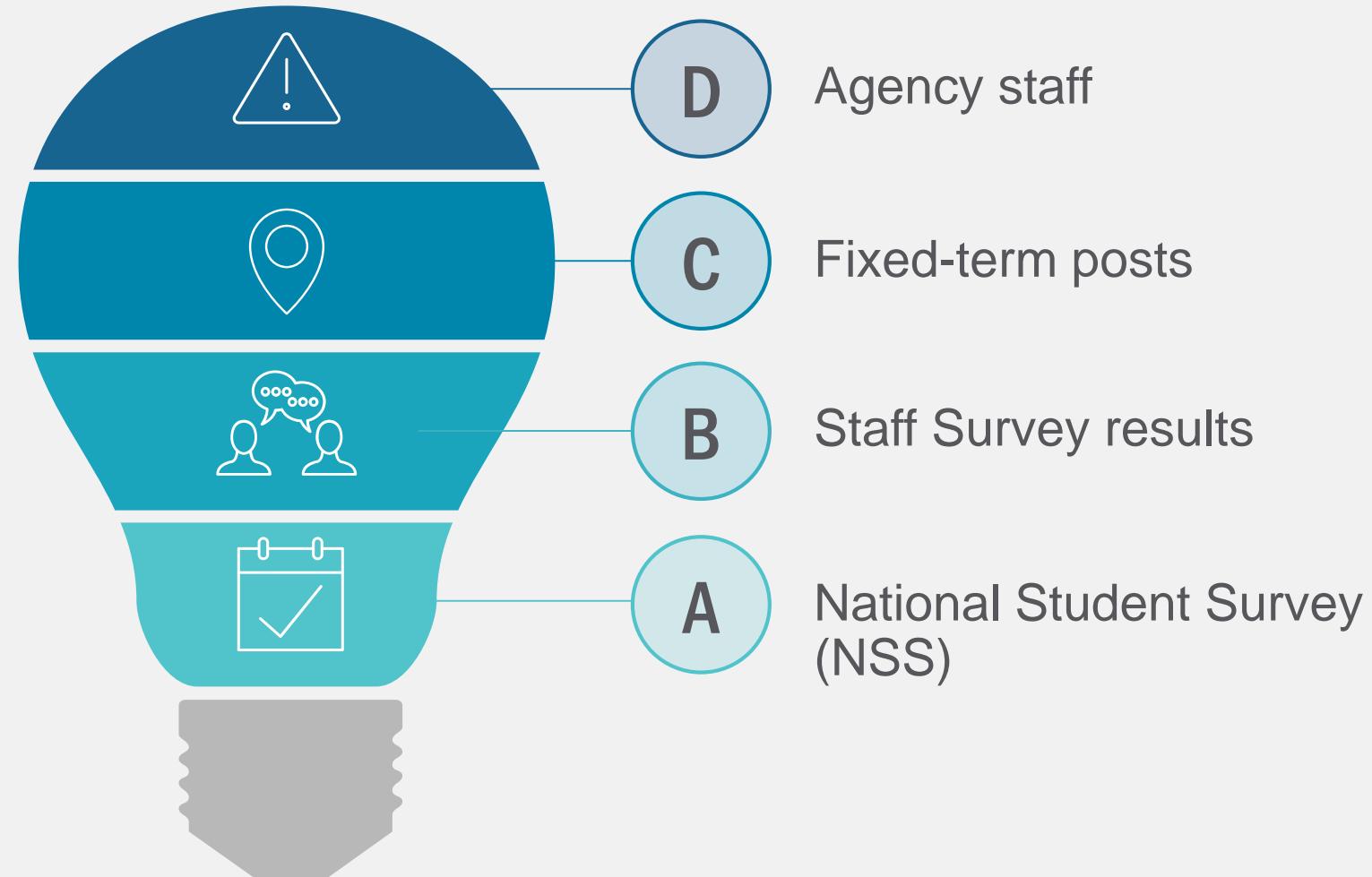


## Contract Salary

> £60,410



## What happens when we take that data and drill down into the detail a little further?

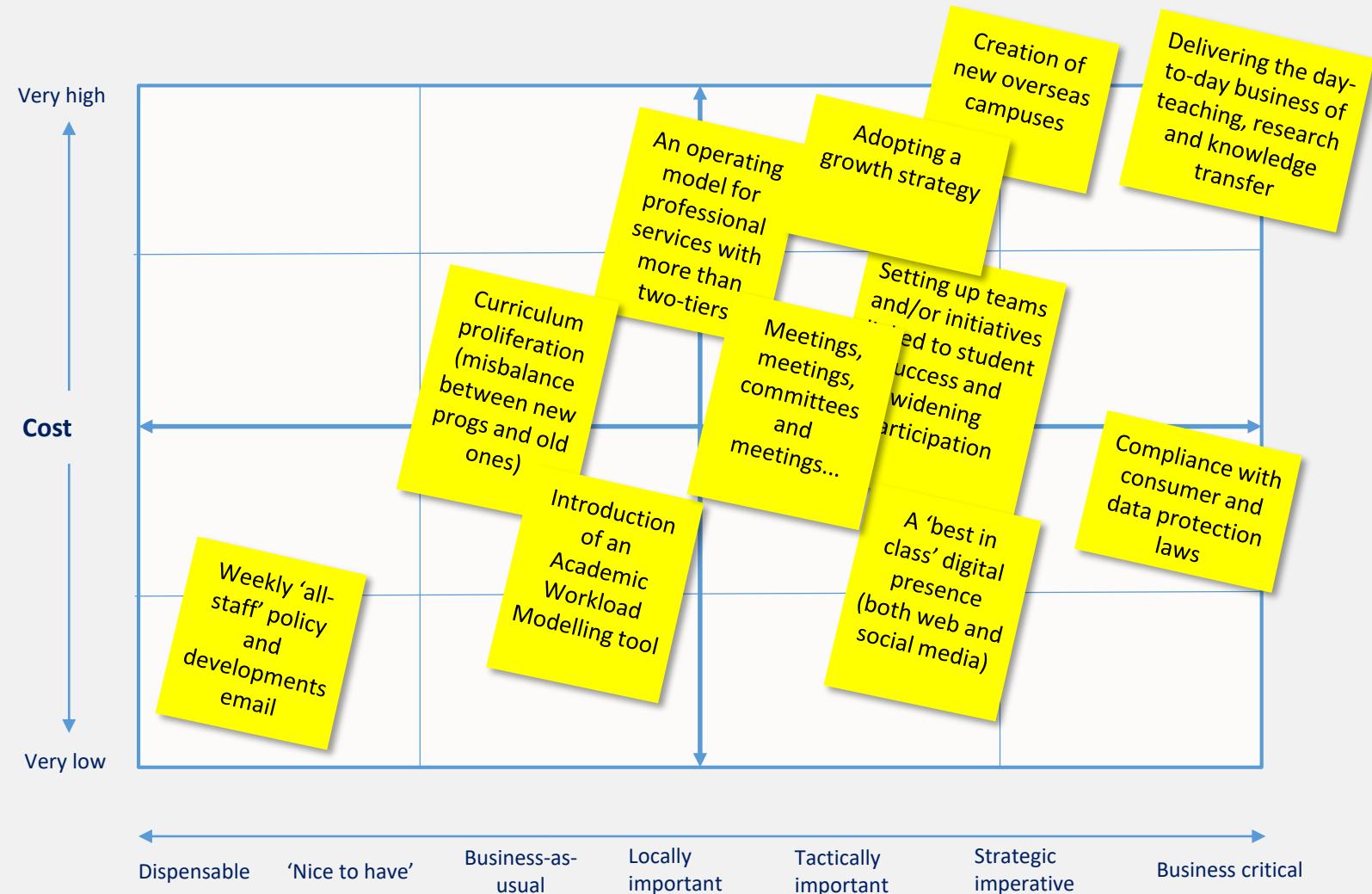


## What else would we advise looking at beyond the quantitative data?

“The biggest problem  
we have here is that  
we’re great midwives  
but terrible  
undertakers”



# An uncomfortable truth about some projects and activities in universities



# Some guiding principles when you have no choice but to reduce direct cost



## Be guided by the data

There are trends and patterns you may never previously have spotted which can be made richer when compared to a benchmark group



## Quantify the value of every activity

Be honest about the things you're doing that are 'nice to haves' and prioritise everything according to its strategic importance



## Work towards flexibility in your operating model

Rigid lines of hierarchy and a culture that sees employees as 'owned' by a department instead of the university are both very limiting



## Invest to save

You can't make multi-million pound savings by being tentative. Processes and systems need serious investment to deliver sustainable change

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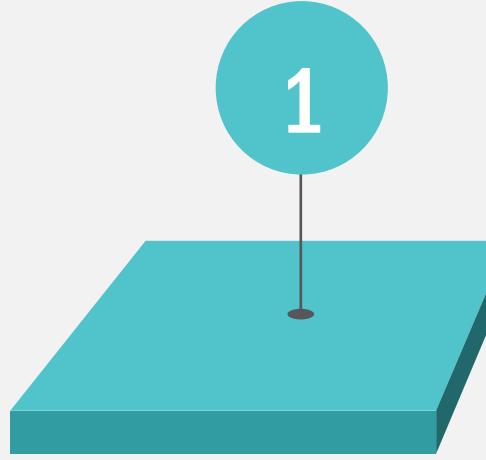
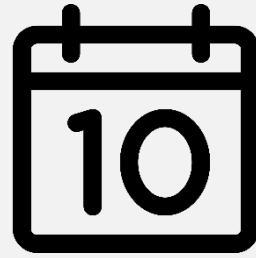
New ways of working

**“We shape our tools and then our tools shape us”**

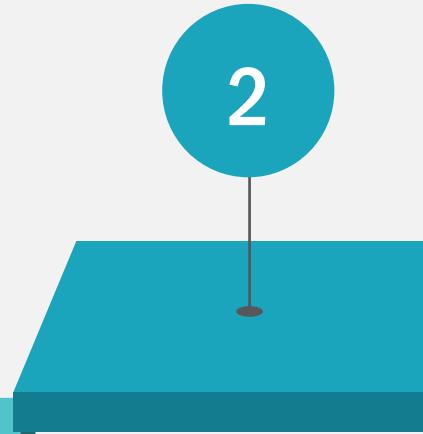
Professor Marshall McLuhan & Father John Culkin



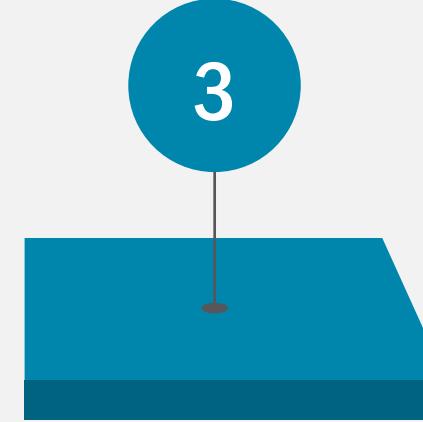
# Calendar transparency



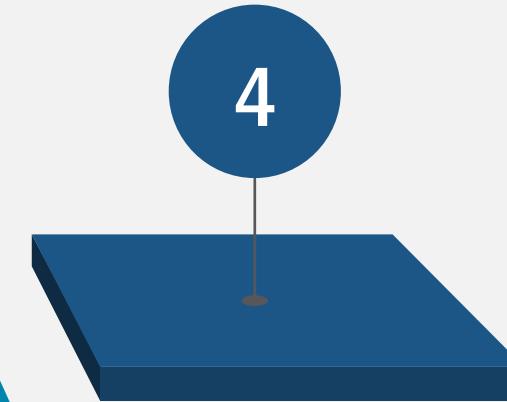
Paper diaries. Availability info not visible by colleagues



Digital calendar replicates paper. Availability not visible.

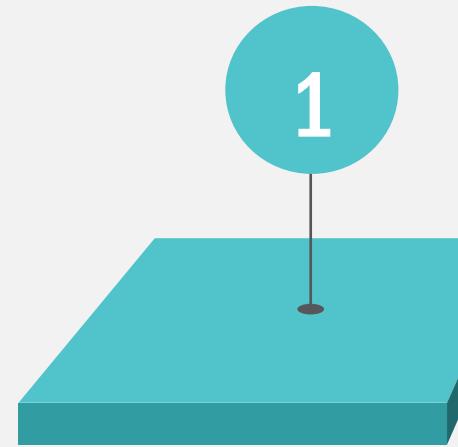


Semi-open digital calendar:  
Free / Busy visibility only.

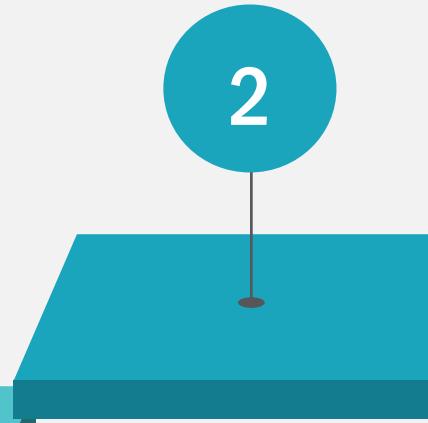


Fully open digital calendar:  
Title, location, attendees etc.

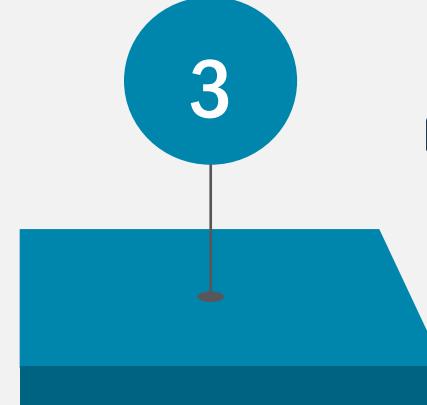
# Document handling



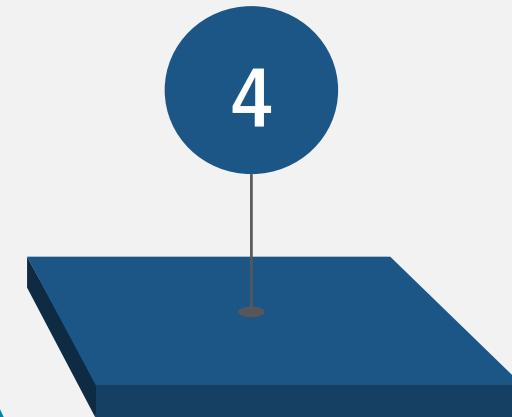
Circulate printed document by internal mail, comments are scribbled on it.



Attach document by email and circulate, everyone sends back conflicting comments.



Doc in OneDrive/Google Drive.  
Contributors edit or comment and see updates in real time.



Document stored in a digital repository (e.g. SharePoint).  
Clear single point of truth.

# Saving space with agile ways of working

	Before	After
	Work at one fixed desktop computer	Sit down anywhere and work with your laptop
	Docs in filing cabinet or on file server, accessible on premise	Docs available anywhere, synced to laptop for local access
	Attach doc to email and circulate, circulate, get conflicting comments back	Single copy of the doc is kept online, online, all comment at same time.
	Phone calls received on a physical physical line at a specific desk	Make and receive audio & video calls video calls from any location
	1 desk : 1 person	7 desks : 10 people (plus breakout space)



# Invest efficiencies back into student satisfaction

Bristol 1968 –  
students occupy Senate House,  
the central admin building

Bristol 2019 –  
entire building now devoted to study  
space & teaching space



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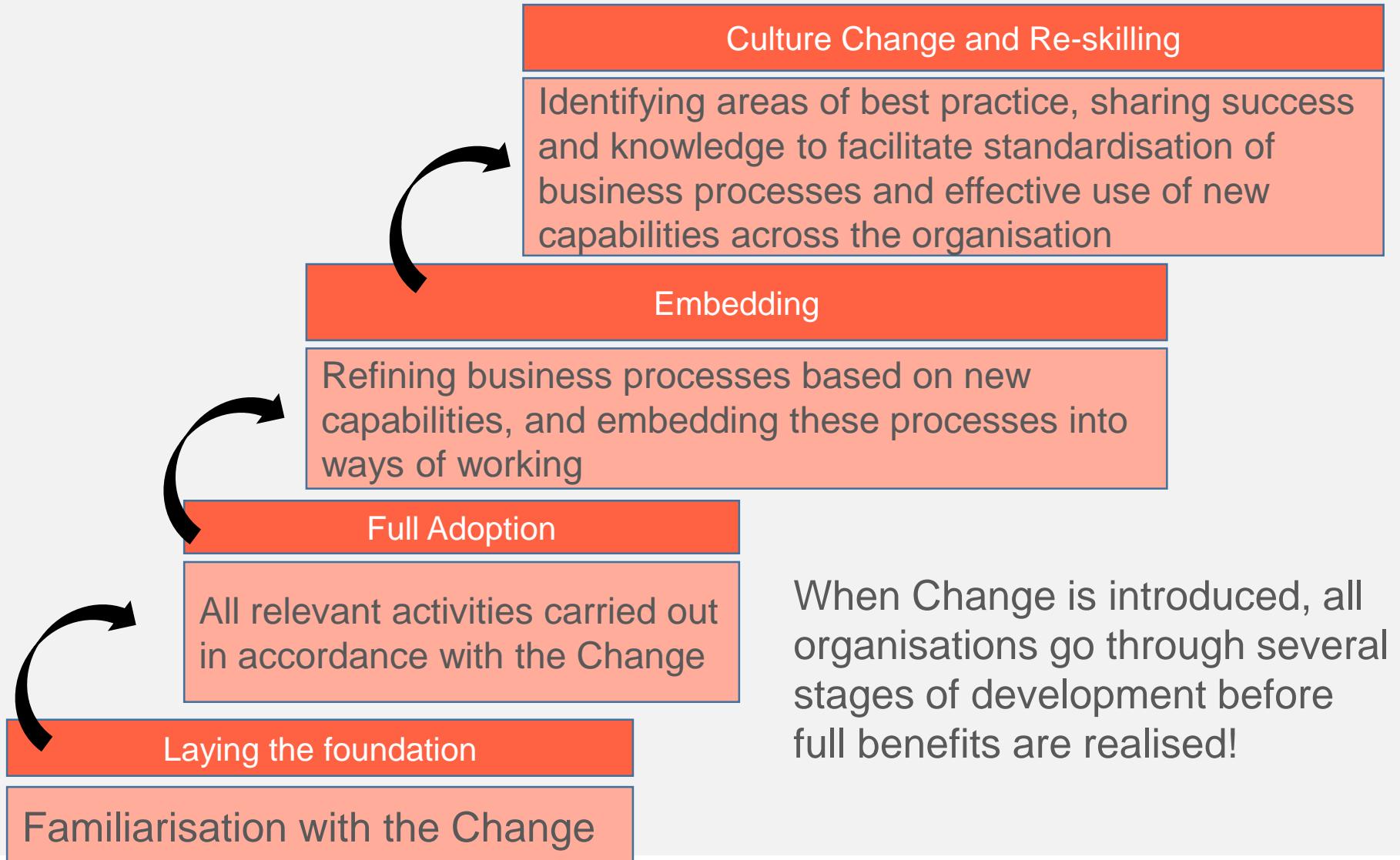
Effective and Efficient  
Change Management

## Successful organisations:-

- Have firm and clear commitment from leadership to make the change
- Have a simple and consistent description of success with clearly endorsed benefits
- Are focused on outcomes, not deliverables
- Have the right approach to solving the right problem(s)!
- Have an appropriate level of stakeholder support and engagement at all levels in the organisation
- Build skills to sustain the change

*Research suggests that less than a third of organisations successfully make the **long term** transition and realise full benefits after a business transformation programme!!*

# Steps to Real Transformation



# Efficient and Effective Change

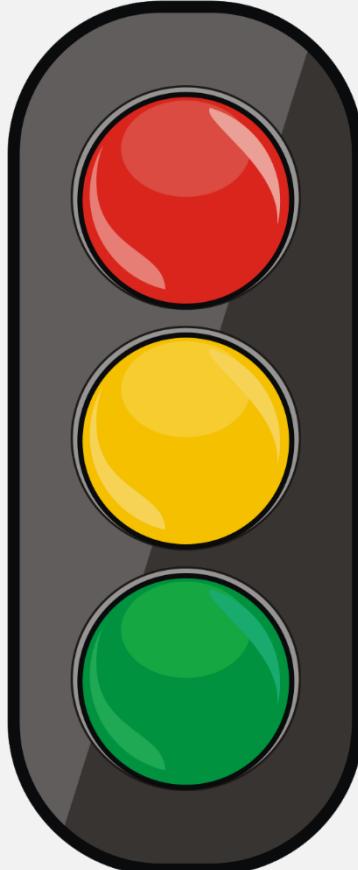
## SUMS Change Management Maturity Matrix

Maturity Matrix developed to aid SUMS Consulting and Universities in scoping support required when commencing assignments.

SUMS Change Management Maturity Matrix					
Theme/Dimension	Level (Change, change-level; 'Business'; 'Managed'; or 'Strategic')	Ad hoc	Managed	Strategic	Supporting Commentary
<b>A. From Strategy and Planning Phase</b>					
Leadership	Ad hoc	No formal partnership for Change Interventions.	Sponsors are assigned with narrow-specific Terms of Reference in relation to their area of accountability and responsibility.	There is active, visible, enthusiastic, trusted sponsorship for the Change. The sponsor has clearly defined areas of accountability and responsibility within overall governance framework.	
	Managed	There is no recognition of the need to resource change management interventions.	Change Interventions are resourced - mainly through external resources.	There is no recognition of the need to resource Change Interventions adequately, building internal capability (to ensure sustainability) - with all agents for change trained and given the time to take on this responsibility.	
	Strategic	The role of 'Business Change Lead' (with responsibility for embedding change in day-to-day operations in order to realise benefits) is not recognized or necessary.	Manager and Supervisor (close to the actual work and impact) are assigned as Business Change Leads in addition to their existing roles but with no formal preparation/training or capacity built in.	Dedicated Business Change Leads are assigned at the start of the Change, with formal training, development and capacity built in to ensure success.	
Focus	Managed	There is no clear vision of what success looks like.	The Change Vision is developed separate from the University's Corporate Strategy.	The Change Vision is fully aligned with the objectives set out in the University's Corporate Strategy.	
			KPIs, drivers, risks identified to support the analysis.	Following analysis, the key drivers for change are	

- '**What**' not '**How**' - based on barriers to change and weaknesses identified by the Change Community of Practice through the 2018/19 event year; and in recognition that individual institutions will adopt different approaches (*the 'How'*) based on their current needs and culture.
- **Areas with potential for development** - where there are clear actions to move from one level to another.

# Maturity Levels, Phases, Dimensions



## **Maturity Levels are:**

- Ad hoc
- Managed
- Strategic

## **Across the following Phases:**

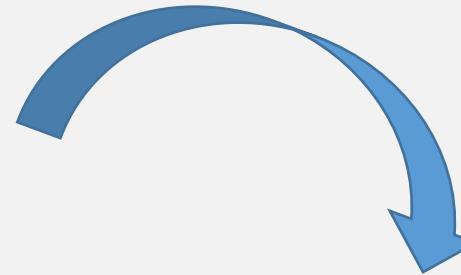
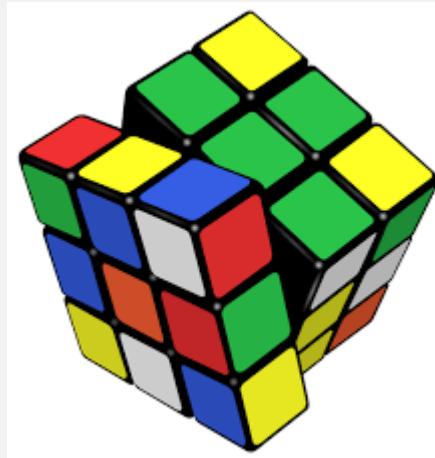
- Strategy and Planning
- Implementation
- Embedding and Sustaining

## **And Dimensions:**

- Leadership
- Focus
- Process
- People
- Approach

# Efficient and effective Change

## Putting It All Together



# The Lean, Mean, Delivery Machine

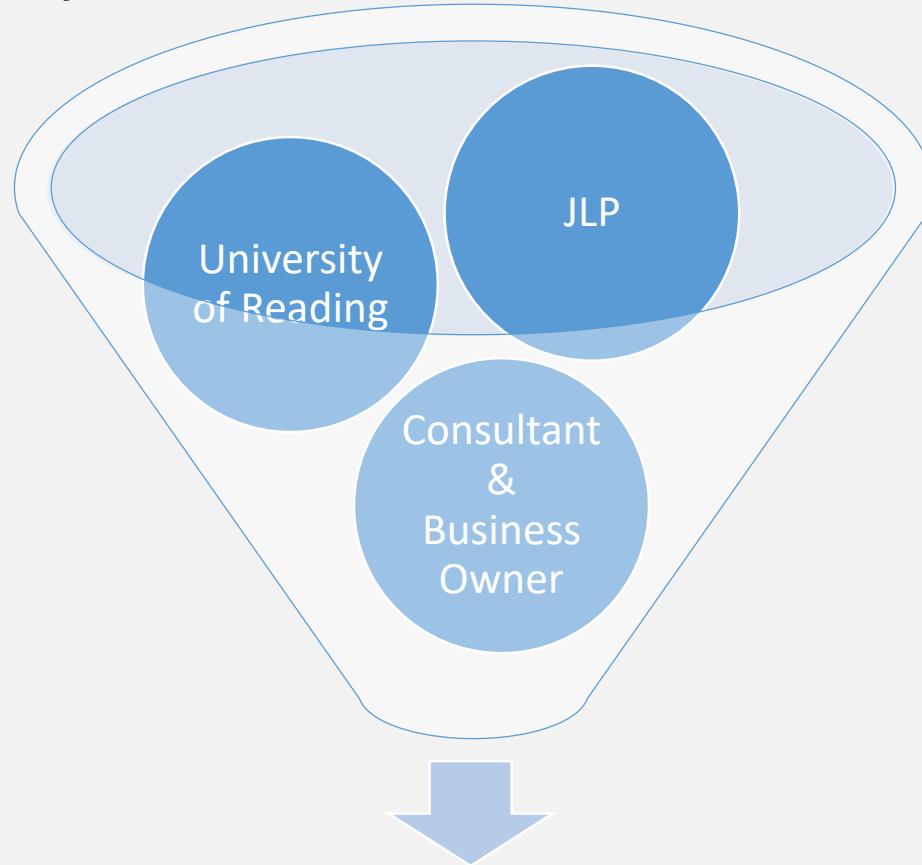
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Professional  
Development Through  
Coaching

## Introductions

Felicity Gasparro

SUMS Associate Consultant & Owner of Oyster Outcomes Ltd



*People centric senior leader with wealth of skills and experience in communications, engagement, marketing and HR.*

I'm also a qualified Coach...

# Presentation Overview

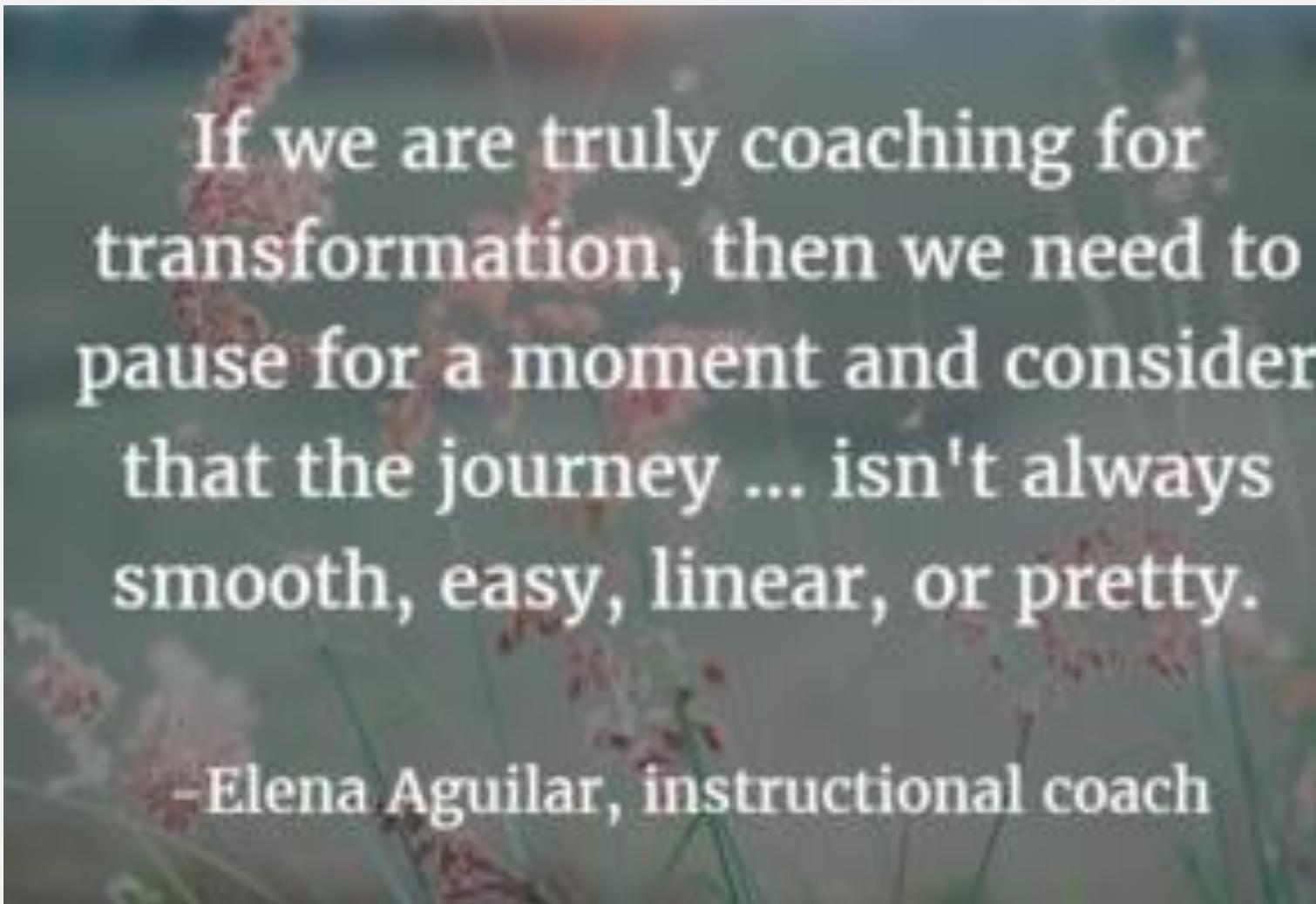


1. Introductions
2. Efficiency and why bother?
3. The Burning Platform – Dr Peter Fuda
4. Why coaching and personal development are vital allies to the sector right now - Mark McMordie
5. Case studies
6. Accessing professional development through Sums



**Efficiency**

**Straight Ahead**



If we are truly coaching for transformation, then we need to pause for a moment and consider that the journey ... isn't always smooth, easy, linear, or pretty.

-Elena Aguilar, instructional coach







### **Dr Peter Fuda**

- Founder & Principal, TAP
- Founder & Director, Enixa
- Adjunct Professor, Macquarie Business School

From burning platform to burning ambition





## **Mark McMordie**

- CEO of The Conscious Leader
- <https://www.coaching-at-work.com/2019/07/07/be-safe-be-free/>

Tap into the psychological and physiological benefits of creating a safe space for people to think, make connections and to access higher brain structures which lead to breakthroughs in thinking.

Mark's is a neuroscientific approach to accessing breakthrough thinking. At Google, they know that the number one factor differentiating their most innovative and high performing teams is psychological safety. Generative listening enables this, helping leaders to access deeper insight into themselves, key relationships and their organisational system and this in turn supports change and transformation in the leader and the wider system.

As the speed and complexity of change globally increases, the need for coaches and leaders who can enable innovation and growth becomes key. Organisations that understand how coaching, psychological safety and mindfulness can accelerate this will have an important competitive advantage.

... with training, leaders and coaches can develop their capacity to offer generative/mindful attention to enable innovative thinking in others.

## Coaching case studies

**Making a return to the bottom line – of financial attainment AND professional attainment**



## Coaching case studies

Coaching has enabled me to....



Lead  
through  
ambiguity

Be Mum



Learn &  
grow

**Efficiency**

Straight Ahead

Work efficiently,  
delivering more for less



Deliver more for  
my employers

Enable  
others to do  
their best  
work



## Access Professional Development Through SUMS

1. Talk to us over lunch – Susannah, Fola, Tim, Helen and myself...
  
2. Contact your SUMS consultant to access SUMS Professional Development Services...
  
3. Contact Associate Consultant, Felicity Gasparro directly, to explore the opportunities for you:
  - [f.gasparro@reading.ac.uk](mailto:f.gasparro@reading.ac.uk)
  
4. Expect a follow up conversation...
  
5. Keep this on your radar – If you recognise the value on maximising the efforts of your people to the progress of the organisation, coaching is for you...