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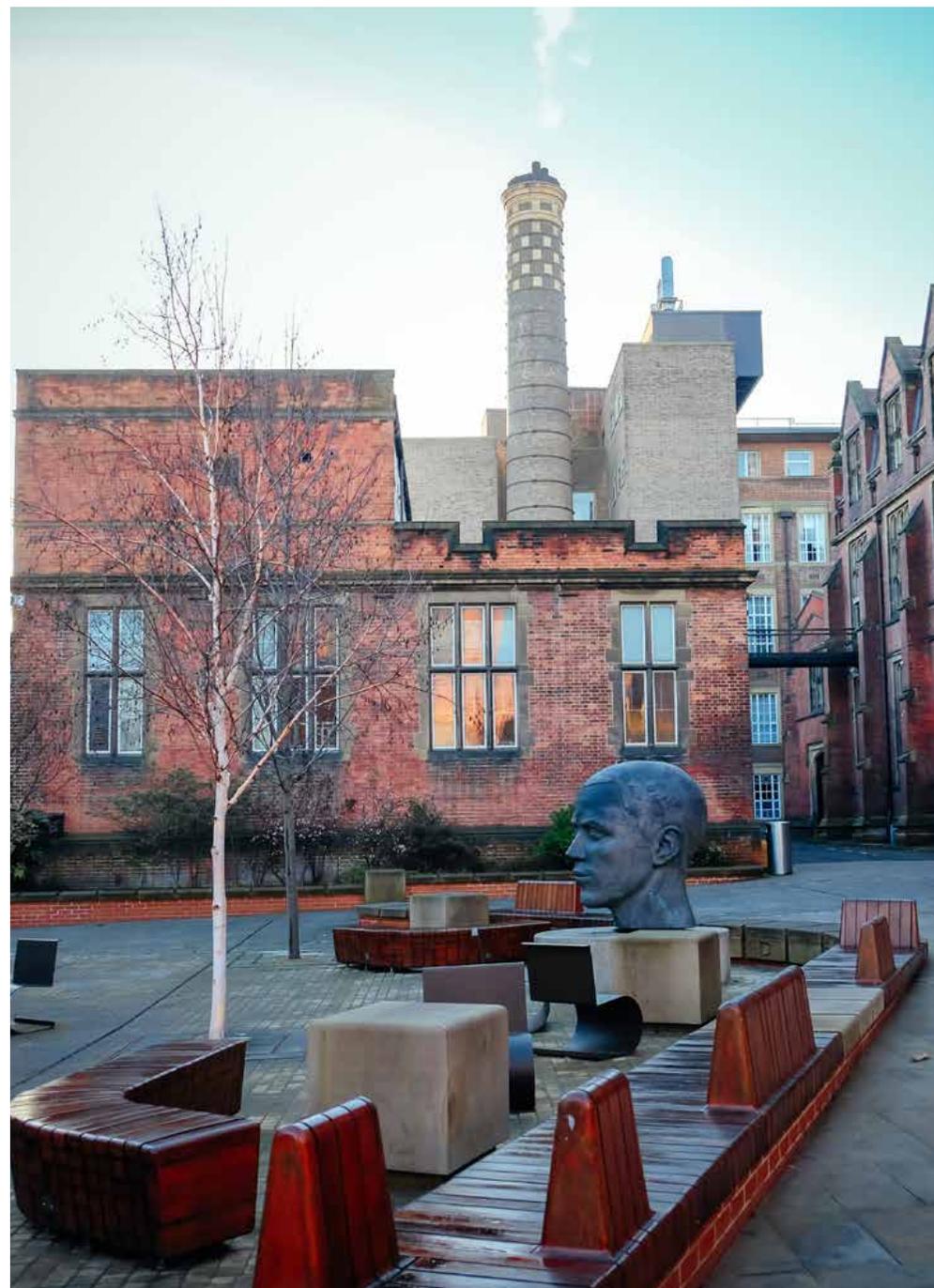


Silver Linings: How the Response to Covid-19 Will Change Higher Education Forever

July 2020

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Bernarde Hyde
CEO

Dear members and colleagues, For those of you who have worked with SUMS over our 50-year history, you will know we work for universities and are owned by universities, regularly delivering over 100 assignments to universities each year. We spent much of the last couple of years having conversations about the many challenges facing the sector and how hard things already were – or were going to be. But reality bites. Nothing compares to the challenges presented by Covid-19.

As a sector, we have collectively responded well. Higher education is at the forefront of the fight – from vaccine creation to training NHS staff, to vital research to better understand the disease. And we have been proactive in protecting our students and staff by adapting to working, teaching, studying from home. The response has been heroic and made me personally very proud to be part of UKHE.

This is a time of crisis. Covid-19 is a threat to our health, our lives, and our livelihoods on a global scale. But I remain optimistic. Expert academic advice is back where it should be, shaping the agenda, the response and public awareness. Similarly, the virus has been a catalyst for rapidly developing and deploying online teaching and learning resources. The sector is doing what it does best

– thinking, learning, innovating – spurred on by the crisis.

In the midst of this, SUMS is here for you. We are busy working collaboratively with other HE bodies. Working from home has not stopped universities from working, so we have adapted to continue to help our members and clients achieve their goals. As an HE-sector body, we're here to help you whatever challenges you face. We are all in this together.

So, as you and your university tackle the challenges, we are here for you. If you want a chat with someone objective with a view across the sector, please give me a call or get in touch with one of our consultants. SUMS membership is about community.

Our in-depth knowledge of higher education sets us apart from other consultancies. We thrive on complex problem solving and deliver tangible added value to our community of universities. Together we will not only get through this, but we will do so stronger, shaping the future of higher education in the UK. Take care of yourselves and your loved ones,

Bernarde Hyde, CEO



Joel Arber
MANAGING CONSULTANT
AND GROUP HEAD OF
BUSINESS DEVELOPMENT

As the calendar clicked round into September at the start of the academic year 2019/20, it already promised to be a challenging one for many universities. An increasing number had posted financial deficits in 2018/19. This year represented the demographic nadir of 18 year-olds in the UK. Efforts were focussed on student recruitment, in an ever more competitive market. The reality of Brexit and its myriad consequences for the HE sector loomed large. Uncertainty continued following the publication of the Augar Review and a new regulator was beginning to flex its muscles in a way that felt both unfamiliar and uncomfortable.

SUMS Consulting's work across the sector at the start of this academic year largely reflected the challenges universities were facing, with many asking us to help design target operating models for professional services, or create efficiency programmes to reduce operating costs while driving up performance. It was rare for us to speak to universities who thought all was 'well with the world'.

Fast-forward to January. COVID-19 crept silently, malignantly, destructively across the globe. As global businesses,

universities had to take action in order to mitigate the impending crisis. Rather than absorbing COVID-19 as another kick to a sector that was already down, the sector responded positively. SUMS has found that universities' responses have seen the sector at its best.

As we draw to the end of the second semester, working in enforced lockdown, we can reflect on the way our universities have risen to the challenge. Some are already moving from crisis management to business recovery and are identifying ways in which the changes they have made in adversity can be sustainable – changing higher education forever, and for the better.

What we do now will be remembered

Whilst much of the Covid-19 response has been focused on practicalities – what universities did and how they adapted – it is worth beginning our reflection at the strategic level. This is particularly pertinent given



the financial pressures the sector was already experiencing, and the anticipated damage that the impact of the crisis will have on core income streams.

At the outset, each university needed to agree a strategic positioning for their decision-making that would drive their institutional response. At one end of this positioning spectrum is 'financial health', safeguarding university finances; at the other is 'social value', recognising both the direct and indirect importance of universities on the lives and social mobility of their students, the value of the knowledge they generate through research, and the socio-economic impact they have on their locales. This was not a binary choice to make – a battle of social good

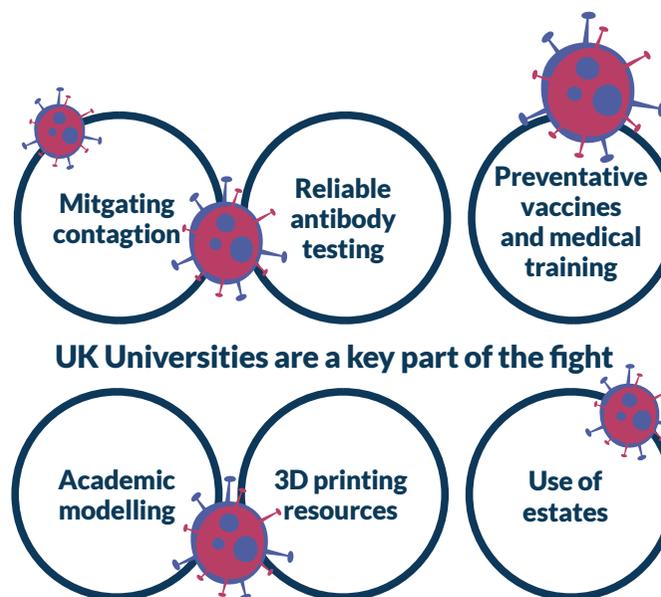
“What we do now will be remembered for a long time. Our city is looking to us. We will be judged on the decisions we make.”

over fiscal evil – but instead a balancing act to carefully judge.

In speaking with a range of university leaders we have discovered that for many, whilst recognising the importance of 'balancing the books', their university decision making was driven by a moral obligation to 'do the right thing'. As one chief operating officer put it, their approach reflected the reality that, "What we do now will be remembered for a long time. Our city is looking to us. We will be judged on the decisions we make".

Nuanced across the sector, this strategic approach covered a number of key priorities. At the top of everyone's list was doing the best to ensure the health and safety of students and staff. This quickly extended to continuing academic and service provision to students, with universities rapidly transitioning to virtual teaching and learning. On these priorities we encountered little variation.

Safeguarding the jobs of staff has been a far more contentious issue. Whilst many academic and support roles have transitioned relatively smoothly to working from home, several functions, for instance cleaning and facilities management roles, have not.



For some, notably teaching-focused universities with strong civic responsibilities, it is a moral imperative to retain these staff, fully paid, even if they are unable to deliver services. Others have chosen to furlough in order to protect staff salaries and university finances. This does raise a broader ethical question: is it justifiable for quasi-public sector organisations with values and mission statements focused on 'doing good' to further burden the public purse by accessing furlough schemes? For universities that have tipped the strategic scale towards financial security at all costs, it would seem the answer is 'yes'. An area on which universities

have typically agreed is that the HE sector has a massive contribution to make as the country navigates its way through Covid-19. The sector has been showcased in government decision-making: experts are back in vogue as politicians look to academic modelling to judge the scale and speed of the crisis, and expert advice on

how best to mitigate contagion. Universities are also at the forefront of the race to create both reliable antibody tests and preventative vaccines. Beyond research universities are fast-tracking the training of doctors, nurses and other practitioners to boost frontline NHS resources; are inviting use of their estates for Nightingale hospitals and temporary mortuaries; are using 3-D printing resources and their fashion departments to help meet the PPE shortage; and are offering NHS accommodation in their halls.

A number of universities are actively demonstrating their roles as economic anchors for their locations. This is perhaps best demonstrated by the application of ethical procurement practices, supporting local companies and in particular local SMEs in their supply chains. Many are prioritising payments to these same suppliers, recognising universities' moral responsibilities



in the economic landscape. Whilst this has been a theme for heads of procurement for some time, the economic crisis brought about by Covid-19 has elevated this item to the desks of university leaders.

The sector is renowned for employing highly educated, talented, passionate people: Covid-19 has provided a focal point for their cohesive efforts as UKHE stands side-by-side with the NHS in facing up to the challenges presented by this deadly disease. Having fallen out of favour with politicians and policy makers in the wake of the Brexit debate, the collective contribution will do much to restore the good reputation and recognise the value of a strong higher education and research sector.

The Tortoise Becomes the Hare

Universities are large and complex businesses. But higher education has lagged behind other complex sectors such as local government and the NHS in terms of implementing major change programmes. This is for a number of reasons, notably including academic autonomy and devolved decision-making. But at the top of the list are cumbersome governance structures that slow down approvals, and the absence of a 'burning platform'. Covid-19 has provided the fuel and lit the match. The sector has responded with remarkable alacrity and pragmatism.

The majority of universities SUMS has spoken to adopted the major incident management



structure of Gold and Silver Command. However, the timing of that response has been far from homogeneous.

At one end of the spectrum, a large post-92 university with a strong Chinese student base began its major incident planning at the beginning of January as Coronavirus cases escalated in South East Asia, acknowledging the reality that whilst it was not yet in the UK, 'it was coming'. The benefit of this approach was in preparedness: "Because we started early, it never felt like an emergency – we've managed to do things at our pace." The extra preparation time has enabled university leaders to continue to focus on other things, including a major efficiency and cost-containment programme, rather than be wholly consumed by crisis management. They are far from unique: a structured

approach with weekly Gold and Silver meetings escalating to daily during March, mirrored by daily executive team meetings, enabled rapid decision making on key issues in many universities.

There are exceptions to this. We spoke to one university whose senior management away day in the second week of March included no discussion of Covid-19. But despite this late start, the university rose to the challenge of the emergency to safeguard its staff and students, and quickly moved into financial scenario planning. The main deficit for this late starter is that it remains in crisis management mode now whilst some others have now disbanded their major incident management teams or scaled back their frequency.

A number of universities pointed to the role of good

communications being central to the success of their efforts. From twice a week to every day, universities scaled up their Covid-19 specific communications across a range of channels. Clear, succinct, regular communication to staff and students was key to university communities transitioning to the current state of working from home and is acknowledged by university leaders as a critical success factor.

University councils and boards have supported rapid decision-making and themselves showed flexibility, with Chairs or committees closely engaged with executive teams. At one Midlands university we spoke to, the full board increasing the frequency of its meetings. The importance of making major decisions at pace, whilst recognising governance

"Because we started early, it never felt like an emergency – we've managed to do things at our pace."

structures, drove a pragmatic shift to the established order. Universities did what was necessary; what was right.

Ultimately, the response to the crisis has shown what the sector is capable of. A sector that has previously found change so challenging has been pushed into it and discovered the reality that ‘ripping off the plaster’ can be less painful than dragging things out over months of engagement and committee meetings. UKHE can make big decisions – tough decisions – quickly, and with an evidence base. And whilst it may have taken a pandemic to show that the archaic committee and governance structures are capable of adapting or being cut through when need dictates, the very fact that this has been achieved is to be celebrated. But it also begs a key question: Why try to revert to business-as-usual when a once-in-a-lifetime opportunity exists to make fundamental improvements to the fabric of HE?

Deliverables, Not Desk time

Universities are inherently social: “We are a community of communities”, as the marketing director at a research intensive university told us. Yet as entities that thrive on academic collaboration, socialisation, and

Teams, Zoom, Google Hangouts, and Skype, have all opened a window into our co-workers kitchens.

in most cases a strong sense of ‘place’, necessity has dictated personal physical isolation.

Working from home has become the new norm – at least for now. Wherever possible, both academic and professional services staff have migrated to this reality. Colleagues across the academy have moved their working lives online as Teams, Zoom, Google Hangouts, Skype et al, have opened a window into our co-workers kitchens.

The reluctant have been forced to change – sometimes quite creatively. In response to more than 200 office-based staff asserting that they had to work from the office and were unable to work from home, one university facilitated this by enabling them to work from the university library while the rest of the campus was closed for

office working. When presented with this option, all but 19 found that home working was feasible after all.

Many university IT directors and change leaders are celebrating that they have finally got the traction they needed to roll-out software adoption, with Office 365 and Microsoft Teams leading the tech field. “Everyone is learning through the emergency – which is like having a crash course out of necessity. But it is working!” as a university registrar put it.

However, getting the tech in place to enable working from home was the easy part. Shifting long-established cultures to optimise its effectiveness has

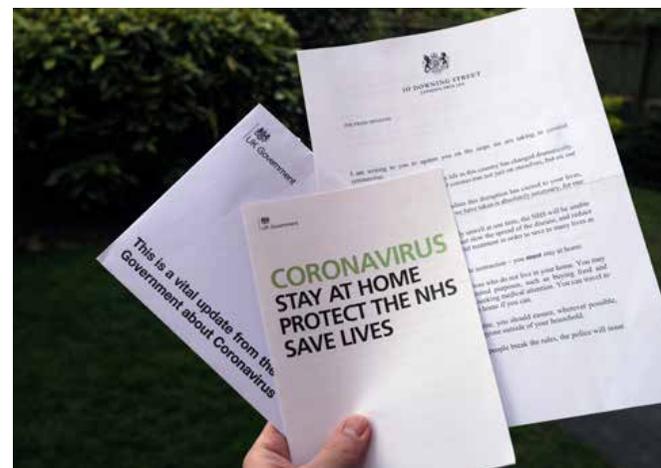


provided far greater challenge for university leaders.

As historian Eric Hobsbawm famously commented, “Industry brings the tyranny of the clock”. This time-tied approach to work remains core to many university workers in 2020 even though its relevance is better suited to the first industrial revolution than to Industry 4.0.

Yet presenteeism and hours worked remain pervasive and are still incentivised in many universities through outmoded mechanisms such as Time-Off-In-Lieu.

The home office setting adds contextual complication to the concept of working ‘core hours’. Thanks to Covid-19 university staff are having to balance other commitments with home working, such as homeschooling children or supporting elderly parents and neighbours. They are willing, but not necessarily able to work within the traditional constraints of the 9 to 5. It similarly presents challenges for managers, unable to oversee a presenteeism model within this context. As a sector, HE has failed to get its head around the reality that outputs are a more relevant measure than hours. This has to be done on the basis of trust – a word overused in universities’ value sets, but one that needs to be actively deployed between employer and





employee in the future of work. Adjusting to the more flexible working patterns required by staff during this lockdown presents an excellent opportunity for universities to make the leap. Their employees can then focus their energies on delivering what is needed, not on clock watching.

The shift to working from home has also made a positive impact on university meeting

culture. Many universities are seeing online meetings as being more effective. They are typically shorter and more intense: attendees have to focus and make decisions. Others specifically referenced that it has cut out some of the politics and posturing – with less scope for people feeling they need to be seen to be making a point. The greater concentration required makes back-to-back

meetings problematic. Full days of meetings are all too familiar for senior leaders on campus. If the shift online has taught us that shorter meetings with more gaps between them is a more effective way of operating, the sector should do all it can not to simply revert when universities reopen their physical spaces.

A Digital Future, Today?

Through extraordinary efforts UKHE has moved its operations into the virtual world, practically overnight. Despite the obvious upheaval, this has been achieved remarkably smoothly.

The response to the crisis has driven forward the digital learning agenda at pace, and all universities that SUMS has spoken to agree that they have seen real benefits and cannot simply allow things to return to business-as-usual when the restrictions are lifted.

In terms of digital teaching and learning, one teaching intensive university reported that in a number of subject areas they had seen higher attendance and engagement at online lectures than they had experienced on campus. With a high proportion of mature and part-time students, the working hypothesis of this university is that their students

may well find digital delivery a preferred option for passive content, such as lectures. Their students would see greater benefit from making the trip onto campus for more interactive, value-added sessions such as tutorials and seminars.

Somewhat inevitably, universities reported that their academic teaching staff had widely varying skill-levels, experience and attitudes when it came to online learning: not everyone is operating at the same level. The onus is therefore on universities to both upskill its front-line staff to improve the quality of online content and presentation – supported by culture change. One chief operating officer captured this challenge: “Some of our lecturers can’t wait to get back on campus, back to their old rooms, and go back to doing things as they’ve always done them. That can’t happen. Teaching online – that will remain in place. But we are going to need to help those people get better, get comfortable with it...so they don’t want to go back to how things used to be”.

SUMS has undertaken a survey of undergraduate students to ask them about their experiences on the receiving end of online teaching in the first two weeks

“Some of our lecturers can’t wait to get back on campus, back to their old rooms, and go back to doing things as they’ve always done them. That can’t happen.”

of lockdown. Nearly half of our respondents said that their experiences of remote learning had so far been ‘somewhat effective’. Only one agreed that their experiences had been ‘very effective’. Perhaps this is not surprising given the newness of approach for many students, institutions and lecturers. One student called out real concern for their progression to their second year – “All my exams have been cancelled and as I progress onto year two, I am finding it hard to develop essay writing skills”.

In discussing this predicament with an experienced HE online learning designer, he draws out the key point which must be taken on board to enable HE educators to enhance remote learning delivery: “We need to be setting up the online environment not just to teach, but as a conduit for students to learn – there’s a key difference between what is taught and what is learnt, and this shouldn’t be overlooked”.

If a mixed experience of online teaching and learning from both providers and recipients may have been expected, perhaps more surprising is that it has highlighted digital inequality in some universities. The working assumption of the transition online has been that students



are digital natives; but access to the technology is seemingly not ubiquitous. One registrar explained the problem: “We identified a much larger group of both staff and students than we expected who are digitally deprived in their own homes making remote working and remote learning very difficult. They don’t have stable internet access and appropriate devices. I feel as though we should have known this already given how important the access to our VLE and online learning materials is in every programme. We will have to pay more attention to this in the future and have better ways of bridging the gap”. As the sector continues to support social mobility through participation and access agreements, ensuring that digital

“We identified a much larger group of both staff and students than we expected who are digitally deprived in their own homes.”

inequalities don’t widen the gap further needs to move higher up the priority list.

Much of the focus of this immediate academic response to the Covid-19 crisis has been on teaching and learning. One senior academic we spoke to was keen to emphasise that research is not an isolated activity. And whilst many disciplines are directly involved in research to support the response, the majority are not – and remain the lifeblood of the knowledge economy. Human interaction in the real world, and a sense of identity that is place-based are important to researchers. Yes, many can continue to work at home, but this is limiting. Team coaching has been identified as a way to help build resilience and effectiveness

and help these groups thrive post-lockdown.

There is much to celebrate in higher education’s move online. However, there is also agreement across the sector that this rapid digital revolution is not simply a case of ‘four legs good, two legs bad’. Universities need to exist in the real world as well as online. Academic collaboration is social; and whether its highly skilled research teams or undergraduate tutorial cohorts, the need for collaboration extends beyond digital interaction.

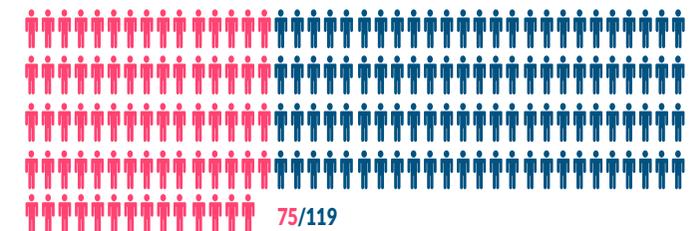
Are ‘Friends’ Electric?

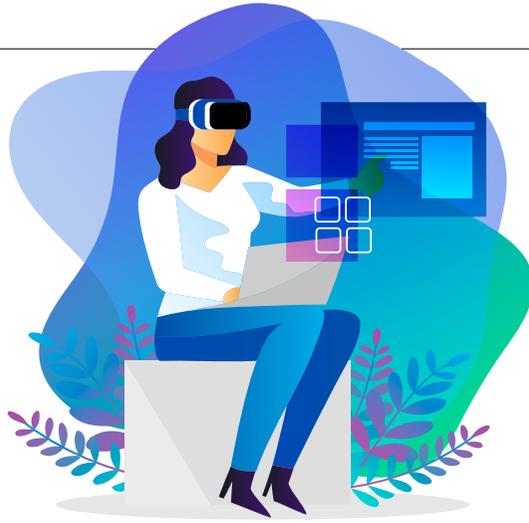
As the weeks of lockdown go by, economic modellers’ predictions of the global financial future have become increasingly bleak. Universities are realistic in their anticipation of a short-term collapse of the international student recruitment market. This will not impact all universities to

the same extent. For instance, SUMS’ 26 member universities’ reliance on international student fees as a proportion of their total income represents a spread from just 4% to a daunting 30%. But any decrease in fee income presents a challenge to a sector where flat income and rising operating costs, notably for pension provision, have left many needing to make efficiency savings. The latest figures published by HESA, based on the 194 providers submitting financial data for the 2018/19 year, show 75 providers in surplus and 119 in deficit: not the strongest financial platform from which to fight the Covid-19 crisis.

In the last 18 months, SUMS has seen an increase in two main tranches of work reflecting the consequences of HE funding challenges. Firstly, we have been asked to support a range

HESA financial surplus data 2018/19





of universities to reshape their operating models to both reduce costs and improve services to students; secondly, we have seen a spike in projects to improve universities' student recruitment and admissions.

A degree of uncertainty still clouds the landscape. However, all policy indications suggest that the Government will act to re-impose Student Number Controls on a fixed-term basis to prevent those universities set to lose most from the depletion of international students from over-recruiting UK students. Were a truly free market allowed to operate, the likely impact would see many universities fail. This is not tolerable for UKHE – nor by a Government that values higher education as one of its top-five export sectors.

These controls will be particularly important given the

absence of Year 13 examinations this year. This has added greater uncertainty to offer making, offer acceptance, student choice and Clearing and Adjustment. During the current hiatus universities have told us that they are focussing their efforts on digital experiences to aid conversion.

The effects of this transition are encouraging and beginning to change thinking in this area. One recruiting university shared that their "Virtual Open Days were as successful as our physical days", supported by technology-enabled interaction and live Q&A. A director of service at another university focused on student recruitment told us that their Applicant Days had been better attended with fewer applicants not attending having signed up. The qualitative feedback received pointed to the digital events being 'less nerve-wracking'. Open Days and Applicant Days on

campus have traditionally been viewed across the sector as the most effective interventions in the student journey for driving applications and acceptances respectively. The early fruits of shifting these events online are reshaping the thinking behind that student journey – pushing it to be more focused on what students want. A university registrar told us they are seeking "More engagement with students in the way they would like to engage".

With no date set for an end to the lockdown, along with the anticipated continuation of social distancing measures for some time to come, a large number of universities are scenario planning with a view to Semester One of

the 2020/21 academic year being delivered online. Universities are exploring with Government and the Student Loans Company whether they can increase fees for distance learning provision to 50% of on-campus fees.

As current students have adapted to online learning and prospective students to online events, this would surely seem a manageable next step. SUMS thinks this underestimates student motivations for university study. Existing students may have coped with the move as short-term to get through a crisis; but for new students, the prospect of going to university but not going to university is quite a different prospect. Beginning their

university careers without the opportunity to develop real-world social and academic networks; experience what it is to be a student on campus; engage in clubs and societies; and for some – live away from home and develop independence as a rite of passage, does not have the same appeal. If it did, then bluntly the Open University would not have reported an operating deficit of £100m+ last year.

To return to an earlier theme, universities are inherently social. The response to Covid-19 has shown us that there is a digital future for universities, but one balanced with their real-world existence. The digital world is there to support and enhance – not to be a replacement.

Conclusion – Covid-19, What a Catalyst You Turned out to Be

Covid-19 has seen the higher education sector respond well under pressure. It has showcased the importance of our universities as generators of knowledge, original research, new thinking, and educators. And it has shown that these often lumbering organisations can be decisive and fast-moving.

Whilst the doom-mongers predict dark days for university finances, the unintended positive





consequences of the sectoral response are there to show us all how we turn the challenges we face into opportunities. Looking at how the sector has adapted, has demonstrated that it is more open to change and different ways of working; it

“Some of the areas that we have closed – maybe we will never actually open them again in the same way.”

employs resilient, effective teams of people; it can think fast and make decisions quickly within governance structures that have proved to be less rigid than one might have imagined. These realities will help reshape the sector in the aftermath of this pandemic.

Our conversations with university senior leaders point to there being three large shifts:

Firstly, the sector must embrace the financial challenges to transform its structures, processes and systems for good. If a ‘burning platform’ is required to drive major change, then this crisis is a tremendous opportunity. Universities do many things – deliver many

academic programmes, research a wide range of themes, and support academics and students with a vast array of services. Many are inefficient and could be improved. Some are a luxury that universities may no longer be able to afford. The sector has a chance at this time to reduce or cull its non-essential business areas. As a university registrar mused, “Some of the areas that we have closed – maybe we will never actually open them again in the same way. Maybe we will decide to stop providing that

service or to stop running it in house as we do now”. Do this from an evidence base – review the data, undertake research where required – so universities can make the hard decisions. But don’t let the opportunity pass.

Secondly, the digital transformation of universities will enhance rather than replace the physical campus; it is here to stay and will transform the physical landscape of the sector. The days of packed lecture halls should be consigned to

history, with digital delivery of passive content being a major improvement to take from the crisis response. Home working won’t completely replace being on campus, but its lasting legacy will be greater flexibility of location and time. The need for ‘space’ will be reduced. How does this sit with a sector spending £3 billion+ a year on estates maintenance, according to the Association of University Directors of Estate? “We see the future as being investment in a smaller, but higher quality estate”,



a chief operating officer told SUMS, with increased investment in IT infrastructure and systems.

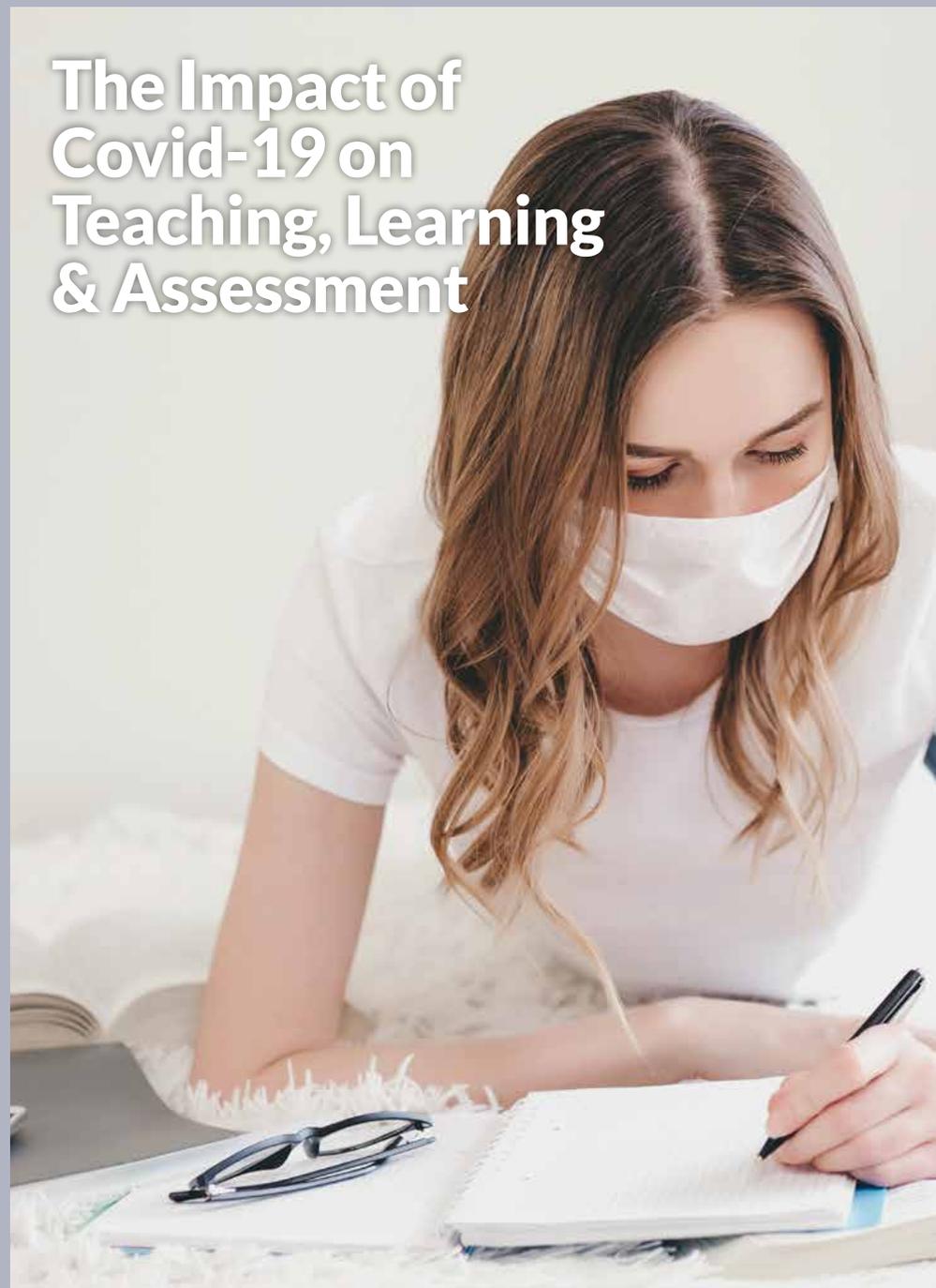
Finally, the crisis has called into question the flexibility of the traditional university calendar. University leaders are predicting a transformation of the academic year – creating a flatter year with more enrolment windows, with students joining at times that suit them, reducing the reliance on the September start date. “We already have January and May entry dates for many courses and we think this fault line might make those entry dates even more important in the future”,

we heard from one registrar. But that could just be the start. We need only look to larger global private providers to see far greater optionality with a roll-on, roll-off approach to modules. This shift has the potential to ease recruitment congestion and the over-reliance on Clearing as a sweep-up mechanism.

It has taken a global pandemic to shake up higher education in the UK – but shake it up it has. The opportunities it has presented point ‘business recovery’ to a new model, rather than returning to the old ‘business as usual’.



The Impact of Covid-19 on Teaching, Learning & Assessment



Claire Taylor and Nick Skelton, share insight from their research into the implications of the pandemic on Teaching, Learning and Assessment.



Claire Taylor MBE
PRINCIPAL CONSULTANT



Nick Skelton
ASSOCIATE CONSULTANT

Digital Education

In response to Covid-19 and social distancing restrictions, many universities were quick to move the remainder of their 2019/20 teaching online. For some students, this will have meant little change with Semester 2 entering its closing weeks. For others – those on January starts, year-long professional courses or just about to start pre-sessional activity – a much higher proportion of teaching will be delivered through this different mechanism.

Whilst it is admirable that so much has been done so quickly, the quality of provision will have suffered due to speed of transition and lack of knowledge and experience of the majority of staff in delivering teaching

wholly online. Indeed, for many lecturers this will have been their first experience of delivering online content. In this immediate timeframe, students are likely to accept a lower quality of provision: engagement levels will have been forged through face-to-face tuition and will sustain through this transition. For new modules, the digital experience will need to be the source of that engagement.

SUMS has been working with a number of institutions and with the network of educational technologists across the sector to understand the impact and opportunities that Covid-19 offers.

Universities are considering a number of options for September 2020, including on-campus, digital-only, postponed starts, and bi-modal delivery. Each university



Three options to consider when delivering online learning resources

must scenario-plan to understand the implications of each of these approaches within their own context. For example, small private institutions with high proportions of international students might favour postponed starts, since the majority of their students may not be able (or willing) to travel in September 2020.

Those universities who already have experience and expertise in delivering online teaching may be able to adopt the second approach, whilst those with high levels of teaching requiring specialist space or equipment (STEM, creative or performance) will need to at least balance digital provision with an on-campus experience.

What Does Good Look Like?

Digital education is not just about delivering content to students online – replicating lecture theatre content in the digital world. That may work, out

of necessity, as a short-term fix for the Covid-19 crisis, and it has the advantage of being both quick and cheap to implement. However, designing a good online experience is quite different to designing a good in-person experience. It will take time and effort and universities will need to upskill their staff to produce it. If your institution is not a leader in digital education, now is a good time to learn from others in the sector. Sector bodies including **Jisc** and **ALT**, the Association for Learning Technology, are good places to start. SUMS will be producing a series of papers on Digital Education over the next few months (see below for further details).

SUMS sees people across the sector asking: “How can we create digital learning resources by September?” To some extent this is the wrong question to ask; education is a social process, it is more than the delivery of

content. However, there is an understandable desire to reach for ready-made solutions. To explore this, consider three options:

1. Published courseware (commercially produced online learning materials)
2. Open educational resources (OERs: digital learning materials produced by another institution and freely licensed)
3. In-house developed resources.

Commercial solutions can be expensive and potentially sterile without specific institutional cultural characteristics. If learning comes mainly from the digital equivalent of a textbook, students may question the value of their experience. Whilst the idea of OERs was popular in the 2000s, the concept never really took off: the academic community, unsurprisingly, seem to prefer generating their own content rather than teaching other people's. Palpable



engagement from academics is key to generating and sustaining engagement from students, especially online. Neither commercial courseware nor OERs offer a quick-fix, zero-effort solution: they could both be part of a long-term term approach but are not likely to provide the full picture. The most successful digital education programmes are those led by lecturers, drawing on expertise from professional academic librarians, learning technologists and learning designers. For successful, sustainable digital education it is essential to upskill your academic staff so they have the ability to produce their own digital learning resources and have the confidence to lead digital learning and interact with students online. We recommend that you put resources

into a similar programme at your institution.

The best digital learning programmes use different techniques to campus-based learning programmes, but like anything else these techniques can be taught. Some universities are already running 'crash courses', delivered online, to teach lecturers how to teach online. SUMS

How Can We Prepare Our Staff and Students for this Change?

It is tempting to see COVID-19 as an occasion where "change happens gradually, and then suddenly", to misquote Hemmingway. But COVID-19 will not inevitably lead to change, or rather, it will not inevitably lead to successful change. There may even be a bifurcation across the sector:

- Universities which are already leading in digital education will now embrace this sudden necessity and are more likely to make a success of it. In future years they will use this to spur even greater moves to a blend of physical and digital education.
- At other institutions where the digital education strategy is less clear, sudden moves now may be resisted. Any digital failures will be held up as prima facie evidence that 'face-to-face is better' and lead to future initiatives stalling.

If your university is currently in the second group, it is vital to take a people-centric change management approach. Listen to the concerns of your staff and of your students and take steps to address them.

The limited time to prepare before the autumn, and confidence that new arrangements will hold up once in use, are likely to be top concerns from staff. Universities which prioritise digital education should find other activities they can shelve to create capacity amongst their academic staff. Time until autumn 2020 is short, but we are not aiming for perfection, we are aiming to deliver the best we can in this situation.

SUMS has surveyed and interviewed a number of students on their experience of the move online. This indicates that students may accept a digital experience which is rough around the edges in its presentation, as long as other needs are met. Students highlighted that clear

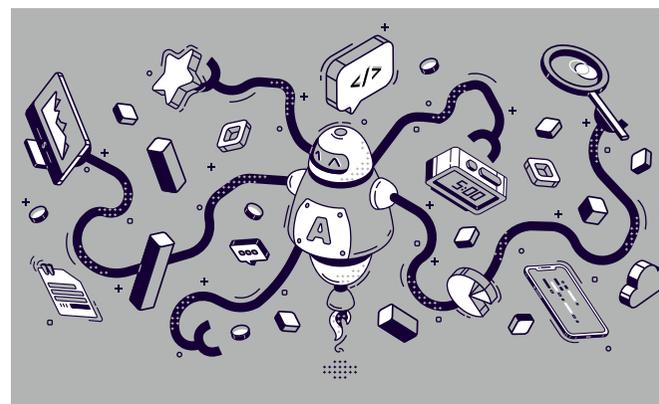
communication and personal interpretation from a friendly face were key. If we communicate clearly with students, support them and engage with them, that will go a long way to meeting their expectations.

What Might Future Good Practice Look Like?

"The future is already here, it's just not very evenly distributed" - William Gibson

The current move online provides an opportunity to rethink the way things have been done before. Different tools permit different techniques, so digital tools are a spur to new pedagogical practices. Successful digital education initiatives are pedagogically led, not technology led. Little of this is entirely new: flipped classroom, blended learning, active learning, and other approaches have been in use for some time and have been studied and evaluated by educational practitioners.

There is much good practice across the sector in the UK. SUMS is currently evaluating this through a comparative study of digital education and will publish more research on this in the near future. Even if you see your university as a follower in digital education there will already be good practice within



your institution. Innovation often comes at a local level, from individuals within particular schools. Look for these people, and bring them into the planning process for 2020/21, while appreciating that scaling up local practices to the whole institution is a challenge.

With greater digital adoption SUMS sees potential to move higher education even further towards an active experience, where students take greater responsibility for their own learning. The table on the right hand page gives an indication of this trend.

In planning this shift, we should look at some of the biggest problems we currently face in



What might physically distanced lectures look like?

the old model (e.g. lack of large lecture theatres, difficulty constructing the timetable) and attempt to solve them through new approaches, e.g. delivering one to many broadcast content online. Simultaneously the shift will create new problems for us to grapple with:

- Do we have enough technology-equipped flexible spaces?
- Do our staff have sufficient skills in learning design?
- How do we monitor student engagement when more delivery is online?

Impacts

- Potential revenue hit from reduction in fees payable for

Traditional Practice	Enhanced Practice
Students are passive learners, delegating responsibility for their own learning to the university.	Students are active learners, taking responsibility for their own results.
Education is driven by inputs, corralled by an attendance timetable. Students expect that if they turn up to the times and places in the timetable, they will passively receive an education, even if they are unprepared.	The educational timetable is driven by outputs. We communicate clearly to students what tasks they are expected to deliver when - each day, each, week, and each month.
Face-to-face, real-time (synchronous) learning is seen as the best or only way to learn.	Learning design includes synchronous and asynchronous learning (e.g. discussion forums, shared documents, blogs).
Teaching students to develop good study practices is an afterthought, delivered by a separate unit.	Development of study skills is integral to the course: the course objective is to develop students' skills as independent learners, as well as their skills in the subject.
In person broadcast lectures (one-to-large groups, non-interactive) are the routine tool used to deliver information.	Bringing students together for large lectures is used as a plenary tool, to develop community, for guest lecturers, to mark significant moments.
The virtual learning environment is primarily a content repository.	The virtual learning environment is a social tool for student group work and student-lecturer discussion. The lecturer is visible and active within the VLE.
Online activity is an optional add-on to the in-person experience.	Online education and in-person education are integrated as one stream.
Live lectures are video recorded, for students to catch up after the event	Video content is watched by students in advance of a live lab session or seminar, for students to prepare in advance
The module is delivered the same way it has always been delivered.	The module is redesigned regularly.
Pen and paper, closed-book examinations under tight time-constraints, focused on recall of content.	Take away examination papers which permit use of digital tools and access to information sources, testing the students' ability to interpret, contextualise and apply information.

online courses

- Online learning perceived as lower value in some cultures
- Attractiveness of courses reduced if students cannot access maintenance loans
- Retention levels tend to be lower for online courses thus financial impact might last through to 2022/23 and beyond
- Information is not yet available to start timetabling, which traditionally has a long lead time.

Remaining Uncertainties

- Financial implications if whole or parts of courses are delivered online
- Results of scenario planning
- The extent of social distancing restrictions in the autumn is unknown, making planning of teaching space difficult
- Proportions of teaching that can be delivered in person in September

Opportunities

- Bolster resources (educational technologists, IT support staff and systems capacity) to support higher volumes of online delivery
- Make courses available to academic staff to teach them skills required to deliver the transformation required

Assessment

The initial response from a number of universities was to cancel spring assessment sessions followed quickly by announcements that summer assessment sessions would be converted from physical, synchronous examinations to take-away examinations. Most have promised safety nets to students, protecting levels of achievement to date so that changes in assessment protocols will not negatively impact marks. Some health-related programmes have had to fast-track their students through final year assessments and out into the NHS and supporting industries.

Key Terms

- Collocated: where people are gathered in one place (as opposed to dispersed: where people are not in the same place)
- Synchronous: where people complete an action at the same time (as opposed to asynchronous: where people complete an action at different times)
- Formative: assessment which is for learning (as opposed to summative: assessment of learning)

Many universities have already experimented with digital

assessment, for example quick online quizzes in lectures to check understanding or small scale summative online assessment, mainly in a multiple-choice format. SUMS published an e-assessment briefing paper in 2018 and concluded that there was no burning platform for transformational change for the majority of institutions. COVID-19 now provides that platform!

Similarly, to digital education, there are first and second-level changes associated with assessment.

Iterative and Adaptive Changes

First-level change can be delivered quickly by converting summer exam sessions into take-away assessments.

End of year exams are collocated and synchronous: they are summative and can represent significant proportions of a year or course mark. They are a big deal to students and present a significant amount of work to the organisation in marking, assurance and governance.

Simply moving standard examinations online comes with many issues:

- The assumption is that people will be physically dispersed but will be able to access a specific



system to complete their assessment. What happens if their wi-fi goes down? What if they do not have access to a quiet space or appropriate hardware or software?

- How might we assure quality? Is the right student taking the assessment with access to the right materials? Is it their own work? Does remote proctoring (if even deliverable) represent appropriate assurance?

Most universities have decided that online examinations are not guaranteed to deliver high

enough levels of assurance or accessibility and that converting to take-away is the more equitable option. Assessment guidance and marking schemes will need to be re-written but assessment can go ahead, and current processes can be adjusted.

Transformational Change

Second-level change asks more difficult questions and leads to greater transformation. What might assessment look like in the future? Might it be more authentic, generative, inclusive

Will this be the end of traditional collocated, synchronous, examinations?

and equitable? What are your university's principles and values and how should they be interpreted through the lens of, and opportunities inherent in, digital assessment?

Do exams need to be strictly synchronous? Digital assessment platforms enable academics to produce question banks from which random sets of questions are distributed to each student. No student receives the same set of questions.

Impacts

- Inability to run summer examination sessions as planned
- Quick change from collocated, synchronous exams to take-away assessments
- Virtual examinations boards
- Reduced occupancy in traditional examinations over next year leading to longer sessions.

Opportunities

- Reimagine assessment, reduce dependence on collocated, synchronous, pen and paper exams
- Bring examination boards processes and information provision into the 21st Century!

A curriculum portfolio: like a well landscaped garden?



Curriculum & Portfolio Planning

It is business as usual for universities across the sector to maintain and develop their portfolio of teaching activity. New courses, new modules, and new content as the academic staff establishment changes. Strategic decisions are made to invest in new academic areas or close down underperforming units. Generally, universities are good at growing their portfolio, and are less good at pruning.

SUMS does not expect significant immediate change in portfolios as a result of Covid-19. Where

institutions have already planned reductions in module or programme delivery, the financial shock of Covid-19 on the organisation may accelerate scheduled curtailment.

It is in the short to medium term that SUMS expects curricula to change. In the short term, courses which have been heavily reliant on overseas students may be at risk. Here we would expect to see course closures, reductions in specific optionality and increases in module sharing.

In the medium term, when the financial impact of

Covid-19 becomes clear, some institutions may need to have a 'root and branch' review of their teaching portfolios to achieve significant cost reductions. This is likely to result in consolidation of academic areas and programmes, and a reduction in the number of modules made available.

Impacts

- Requirement for cost reductions in the short to medium term
- Reduction in breadth of curricula, closure of some academic areas

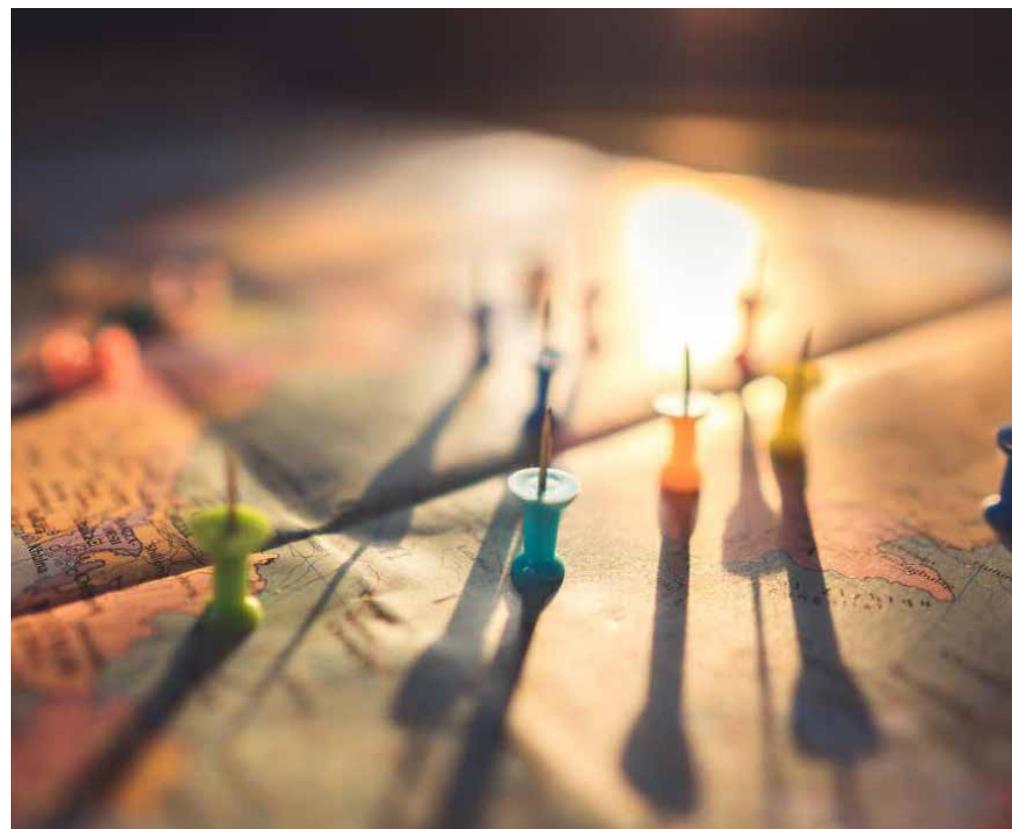
Remaining Uncertainties

- Future of non-standard activity

e.g. apprenticeships

Opportunities

- Delivery of content through a variety of modes for different markets
- Prioritising investment on high performing programmes
- Working together to maintain optionality where required



Pre-sessional Activity

There are a number of specialist institutes for language study by international students across the UK Higher Education Sector. These deliver pre-sessional and foundational English language tuition and IELTS testing to enable international students to proceed onto undergraduate courses.

IELTs testing was suspended in China in February 2020 and will not recommence until mid-June at the earliest. There have been significant reductions in in-country testing opportunities elsewhere. This has already impacted on the process for the recruitment of international students. Universities have responded by analysing the online versions of such tests and indicating which online versions would be accepted for which types of programme. There are similar quality concerns as those outlined for online assessment elsewhere. High quality online tests will be accepted for direct entry, but others may only be valid for pre-sessional activity (e.g. Academic English or International Foundation courses).

Most of these centres have responded to the pandemic by moving content online, accepting that it is not directly comparable with face to face activity: students gain significantly from immersion in terms of social and cultural engagement as well as high levels of functional use of the language. Some are addressing this through an increase in conversational contact hours. Teaching is in general asynchronous due to the variety of time zones students are in. There are also risks related to accessibility of online activity for all potential students e.g. in sub-Saharan Africa access to IT equipment is lower than in China or the Middle East.

Signing up for an online pre-sessional course is seen as a lower risk position than the uncertainty of whether to travel in September so it seems that numbers are holding strong. Warwick has offered its pre-sessional courses free of charge, but it appears to be an outlier: most are holding price points or offering only a small discount (price is seen as an indicator of quality in this market).

While direct income streams



from this activity will only be partially impacted, indirect income streams (accommodation, catering etc.) will be written off and there will no longer be the expectation that a majority of pre-sessional students will continue onto institutional courses.

Impacts

- Significant indirect financial impacts
- Potential reductions in effectiveness of delivery of pre-sessional activity if moved online
- Increased competition from established online providers or in-country provision if moving activity online.

Remaining Uncertainties

- When travel restrictions will be lifted
- Impact of pandemic on willingness of international students to leave their home countries to study
- Whether institutions will prioritise transition of pre-sessional activity online

Opportunities

- Ability to offer dual-mode pre-sessional activity in future years opening up more markets and potential volume upsides

- Ability to upskill students more through judicious use of online activity in-country (e.g. Chinese undergraduate students normally finish courses in July which leaves little time for pre-sessional activity before postgraduate courses start in September)
- Potential peak in demand for 2021 as pent-up demand is realised.

There is no doubt that Covid-19 will change teaching and learning in universities across the world. We are already seeing its impact as the long-needed catalyst for an explosion in digital learning. The key to success will be to design content, delivery and assessment to work specifically for the digital environment – to work alongside content, delivery and assessment in the physical world. The most successful universities will recognise quickly that these are complementary channels to enhance student experience and successful outcomes, not simply carbon copies of each other. The real opportunity is to refocus teaching and learning on the student – long talked about as an approach, rarely a reality – and in so doing, create universities that are truly fit for the future.



David Becker, spoke to HR leaders from up and down the country during April to explore how HR had responded to the coronavirus pandemic, and what they saw as their future challenges.



David Becker
PRINCIPAL CONSULTANT

HR departments at universities were feeling the squeeze even prior to the Covid-19 outbreak. One senior leader we spoke to commented that *“we were under serious strain anyway but Covid has taken things to a whole new level. Our business-as-usual work hasn’t stopped but a whole new set of pressures around furlough, welfare, organisational change and more has been thrust upon us and we’re barely keeping our heads above water”*. Many HR

departments we spoke to had also been deeply involved in the management of major business change programmes prior to the outbreak. Several universities were in the midst of cost reduction initiatives in an effort to ensure that projected levels of expenditure did not exceed income, a difficult ask given the challenges of the external climate in the form of challenging demographics, increased competition and Brexit.

“Let’s face it, we’ve had a narrative about the ‘unprecedented’ times we’re experiencing in HE for years and years. I’ve lost count of how often some policy or regulatory change has come down the line and we’ve all considered that it will be a game changer. It’s started to feel like the boy who cried wolf. But this time it really is going to be different. You can name almost any responsibility in HR and coronavirus will change it. Recruitment, wellbeing, performance...it’s all going to change.”

The implications of the pandemic have ensured that those cost reduction efforts have simply become more pressing than ever, and the package of support announced by the government in early May does not represent a long-term solution. The latest strike action was also a live issue for several institutions, whilst the demands of ‘business-as-usual’ activity were no less burdensome. One HR Director at a large modern university summed up her own exasperation with the process her university had been through to date, stating that *“we’ve been expected to make staff savings in HR to the same degree as other service areas whilst also being expected to support everybody else – now things are even more serious and we lack the resource to manage it effectively”*, whilst another noted that *“our business partners were in back to back meetings pretty much every day of the week even before the outbreak”*.

Notwithstanding these obvious pressures that Covid-19 has exacerbated, all HR leaders that SUMS spoke to expressed pride and satisfaction at the role their HR departments had played in enabling the transition of university staffing from a largely on-site, face-to-face delivery model to an almost wholly virtual



one. For the most part, what had been particularly notable was how few serious issues there had been during the transition. The difficulties were largely ones that could have been anticipated in advance, or which were at any rate easy to respond to: demands for more remuneration in light of increased stress and/or the intrusion of work into the home; greater expense allowances for increased electricity bills and/or wear and tear to personal IT equipment; a reluctance to put learning materials online. As one HRD told us, *“the amount of effort that staff have put into delivering materials online, as well as their capacity to spend endless time on Teams and Zoom, has been amazing”*.

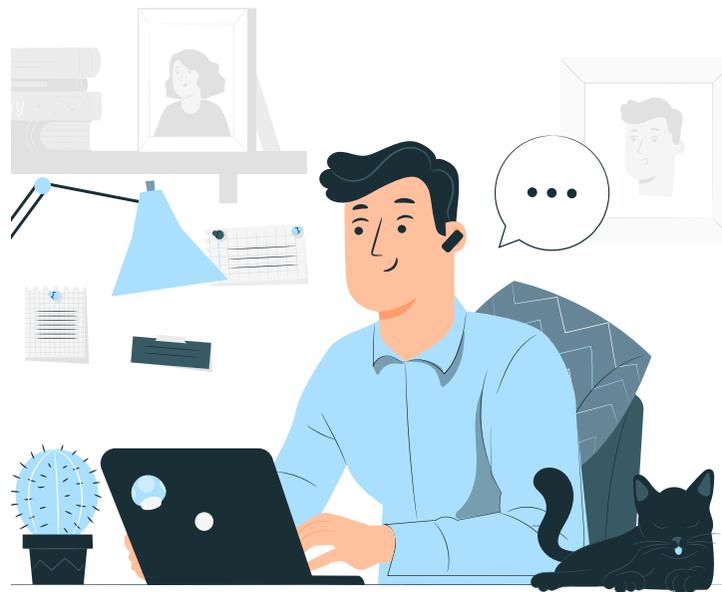
The pressure of the pandemic has also revealed, in some

departments, hitherto unseen reserves of creativity and innovation. This has manifested itself in different ways in different institutions: the launch of a new secondment scheme whereby staff who have seen a decrease in workload can volunteer their time in other professional service areas where workload has increased, picking up new skills in the process; the swift transition of all learning and development workshops to online platforms, leading to notable increases in staff engagement with training and development opportunities; the launch of online ‘hangouts’ and ‘pub quiz’ activities to encourage continued connection despite the lockdown.

With the occasional exception, HR leaders were quick to laud

the impact that the pandemic had also had on the management culture of 'presenteeism' with one HRD noting that "Covid has really helped underline that work is something we do, not somewhere we go". The general consensus was that remote working will now be a permanent feature for most universities even beyond the point that a vaccine becomes available and maintaining health at work is no longer the prime motivation for working remotely: "My own view is that universities have been behind the curve on remote working anyway, it's always struck me as strange that places

so full of innovation can struggle to modernise". A particularly common theme was the vast improvement in the efficiency of meetings with one participant stating that "lockdown has been great for agile decision-making. Our default style in the past has been to manage through committee, tolerating all manner of diversions and peripheral voices in the process. Since lockdown our decision-making has been brutally efficient and all of the background noise has been cut out. I know there's a risk that online meetings could slowly creep up in duration and frequency too but, frankly, I'd hate to go back to how it was before".



Despite the broadly positive reception that the transition to remote working had received, several HR leaders also expressed a note of caution about its longer-term usefulness, particularly within the context of staff wellbeing. Some reported a steady increase in concerns that Teams was resulting in 'staff starting to feel like they're on call 24/7' whilst others were worried about management cultures in particular departments; one HRD cited an instance where 'one of my senior management colleagues seems to be calling his staff for no reason other than to check they're at their computer'. Indeed, the pandemic has worked to underline the view that projects to improve 'organisational culture' aren't always that helpful when conducted in isolation, or when they aren't also allied to 'harder' actions around the reconfiguration of job descriptions and the adoption- and follow through - of performance measures relating to behaviours. Whilst there's little doubt that leadership behaviours heavily influence university culture, HRDs also pointed to their view that universities actually have multiple cultures across different teams which vary extensively and need to be tackled on their own terms. Some HRDs are thinking



proactively about how to tackle cultures as part of a broader programme of creating a fit-for-the-future operating model for the university – something that's almost unavoidable in the post-Covid world and an approach that SUMS would strongly endorse.

Perhaps unsurprisingly, HR teams are at the heart of managing the human implications of the lockdown. Particular concerns raised across multiple institutions included the point that much informal business used to get done between meetings

whilst walking with colleagues to the coffee shop, or otherwise by chatting in the corridor or informally at lunchtime. Some respondents also reported that staff were finding it energy-sapping and demoralising to be in Teams and Zoom meetings so extensively. This particularly seemed to be the case when universities hadn't made a point of rationalising meetings and had simply replaced all the committees and meetings that would have taken place anyway with online sessions for the same duration. In a similar vein, SUMS

heard frustration on more than one occasion that the sudden use of platforms like Teams had led to people neglecting alternative forms of communication including telephone, email or instant messaging. A key principle in striking the right balance was felt to be recognition and acceptance that everyone has individual circumstances that need to be accommodated in different ways during this period of uncertainty: *“Everyone has their own challenges to deal with and it’s our responsibility to ensure we support them through those challenges in a way that works for them and for us. It’s quite right that we should agree different and more flexible working patterns for staff with children, or those with caring responsibilities”*. A notable additional challenge that was cited by respondents include the volume of queries from staff who have specific DSE requirements or disabilities, and who want to attend site to pick up specialist kit or require support at home. Good engagement with Occupational Health, combined with strong, flexible line management were seen as key components in meeting this challenge (albeit with recognition that line management in some teams wasn’t always as strong and flexible as it could be – a point that relates back to the

presence of multiple different cultures within universities, some more beneficial than others).

The issue of furloughing staff was at the forefront of many HR leaders’ minds when SUMS spoke with them - but thoughts about how to engage with the Job Retention Scheme varied quite substantially across institutions. All HRDs expressed some reservation about the lack of clarity around the scheme, particularly within the context of where you draw the line between university staff who are and aren’t publicly funded: *“It’s messy and really quite complicated. It’s also highlighted some serious problems with the way our processes and systems across HR and Finance work together – some of the data has been a nightmare – but we have to work through it. If we don’t furlough then we’re putting ourselves at a disadvantage if our competitors do - but that has to be weighed against the potential harm universities will do to themselves if we don’t play nicely during this period”*.

Another HRD told us that *“the debate about furloughing has been quite helpful because it’s led to an increased focus on where our income comes from and where we’re spending it. That’s previously been the domain of Finance but this time we’ve been*

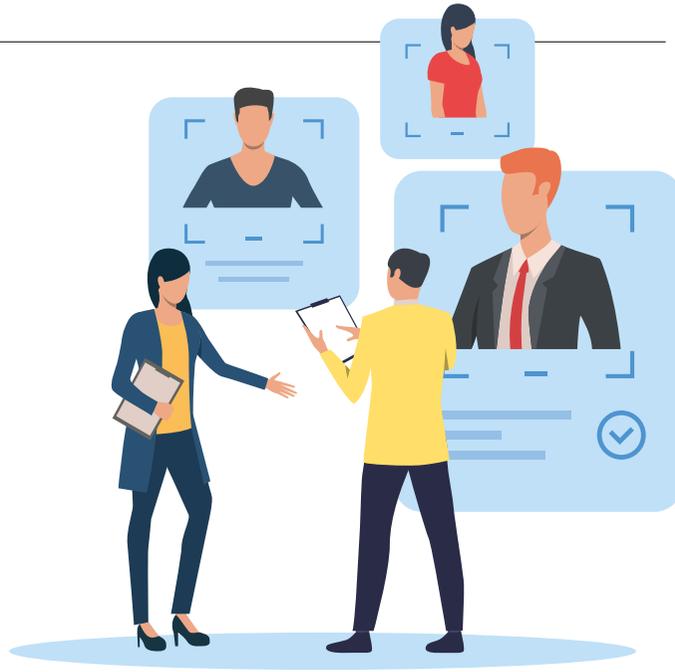
forced to confront the figures as an entire leadership group. In the past we’ve relied on telling a story about how we need to change but we’ve not always considered that colleagues digest information in many different ways. Now we have the figures the need for change is almost impossible to contest - and in terms of having a burning platform that’s a very positive thing for creating a vastly improved workforce”.

All participants, however, recognised the reputational risk that would be attached to any missteps when it came to use of the Job Retention Scheme. Whilst some universities had

already moved to furlough staff in obvious areas like cleaning and catering, there was general acceptance of the ambiguity surrounding whether this was an appropriate decision or not. Several HRDs had pored over the government guidelines and were feeling increasingly nervous about whether the decision to furlough had been made too early, fearing that the government was rowing back from its original commitment. One HRD told us his view that *“those who’ve already moved to furlough may well have gone too far. The National Audit Office are clearly going to monitor the use of*

the furlough scheme in HE and we can expect them to seek repayment in due course”. The reputational risk was also felt by one HRD to be a significant part of the reason not to furlough, noting that *“apart from anything else, universities have already been sitting targets in recent times because of ‘fat cat’ VC pay and perceived greed. We won’t get any sympathy from the media if the government adopts a firm line with us going forward”*. Several universities that had made the decision to furlough were topping up staff salaries by the additional 20% but one noted some pressure from their Finance Director on this point:





"The view of our FD is that the 20% we're topping salaries off with is coming from student fees so the OfS could take a dim view of that in due course".

In the immediate term, virtually all universities have put the brakes on staff recruitment with several having moved to a position where they are not following through with appointments even when interviews have been held and a leading candidate has emerged. This is largely a consequence of the severe financial implications that university leaders are fully expecting to see as a consequence of the pandemic – and the role that HR has to play in managing many of

those implications as they relate to the workforce. To set that in context, most HRDs had been told to expect a reduction in income of between 15% and 30% and that it was therefore impossible not to think that the pay budget would need to be reduced given it generally represents well over half of each university's expenditure.

For the most part, HR departments have continued with casework and are simply conducting it remotely where it has already started: *"Our stance has been that grievances and disciplinaries should continue, we can't allow them to go cold and be forgotten about".* One HRD told us that the exception to

this was in casework relating to performance, stating that *"the bottom line is that where we have performance issues they've generally been around for a while already. They're not going to go away in a couple of months - and you can't create and monitor a performance improvement plan effectively through remote working anyway".* There was a recognition from several participants, however, that there may come a point where this approach is no longer feasible, with dismissal hearings in particular being cited as an example. Others were more bullish, arguing that whilst it would come with challenges, there shouldn't ultimately be any in-person session that couldn't equally be resourced virtually for as long as staff had the right tools and training. One participant

raised the view that *'the current closure of the tribunals may make staff think twice before embarking on a grievance or claim against their employer and we'll be watching that closely following lockdown'.*

The impact of Covid-19 on the workforce was felt to be far more significant than simply becoming accustomed to a change in working environment and practices. Amongst the concerns expressed by HR leaders – sometimes because they were experiencing this pressure themselves – was that employees might legitimately struggle to keep their 'eye on the ball' because of the sure and certain knowledge that cutbacks will be needed - and the *"associated fear that they could end up as one of 'the fallen'"*. One respondent

noted that the scale of cuts could be so severe that *"it risks becoming like the Hunger Games"* whilst another was focused on the impact that cuts to the pay budget could have on those staff left behind and their survivors guilt: *"We've probably all got used to seeing friends and colleagues leave through VR in recent years but this time it could be far more severe and as well as trying to support those who are leaving the organisation we mustn't forget to support those that remain".* There was an almost complete acceptance amongst participants that coronavirus would change the face of universities, as it would most organisations, for good. However, the success with which HR has responded to the immediate implications of the pandemic has not necessarily



bred confidence about its ability to meet the future needs of the university when it comes to leading the sophisticated organisation design and business change activity that virtually all participants agreed would be a necessity in the period ahead: *"I was always confident that we had the skills to manage the immediate fallout and I'm proud of the speed with which HR has adapted – we've done a great job. What I think Covid might expose, though, is that the university as whole is lacking the capability it needs to build the new world that lies ahead and that's not just a problem for HR either. We have business*

change teams in other parts of the university but without meaning any disrespect they are usually project managers or business analysts. We're moving beyond managing restructures or digitising processes here, we're going to need organisation design and business configuration capability. We just don't have this, even if we like to think we do".

Some other issues and concerns raised by participants included:

- In an era where remote working is as commonplace as being office-based, how do we determine our needs for monitoring and responding to



attendance and/or sickness absence? "The early indications here are that sickness absence levels have gone down. You can speculate about the reasons for that but it throws up another question about how we manage performance in future"

- How important will it be to change existing job descriptions to accommodate 'the new normal' – and at what point does a university seek to do that given several will likely need to reconfigure large swathes of its workforce? "If we're being bold, can we reconfigure job descriptions to be entirely about deliverables rather than working hours? What will this mean for industrial relations?"
- A huge number of policies and procedures will need to be rewritten to become relevant for the future instead of the past – and this is something that's going to need to be done in equal partnership with IT, Finance, Strategy and Estates

A common theme across participants was also that some time needed to be carved out imminently for a period of reflection on learnings from the pandemic, or as one participant put it, "we need to make sure that

we don't let a crisis go to waste. Now's the time to strip back the things we don't need to do and to focus on the value add for students, surely? There is a role for HR in that discussion"

Critical Success Factors

During our conversations, SUMS asked HR leaders to reflect on their top three critical success factors for organisations in dealing with the implications of coronavirus. The answers were extensive and varied, adding weight to the fact that it would have been very difficult for any organisation to get everything right during such a time. A selection of the most common components are:

- Try to retain a single, clear decision-making forum at both corporate and departmental levels. Don't over engineer these or turn them into hives of bureaucracy and minute-taking. They should work to support agile and fleet-of-foot management which, after all, is what leaders get paid for
- 'Just Do It'. The pandemic has shown that working at genuine pace is both possible and desirable. "If someone had said 'why don't we move our teaching online?' previously then there would have been all

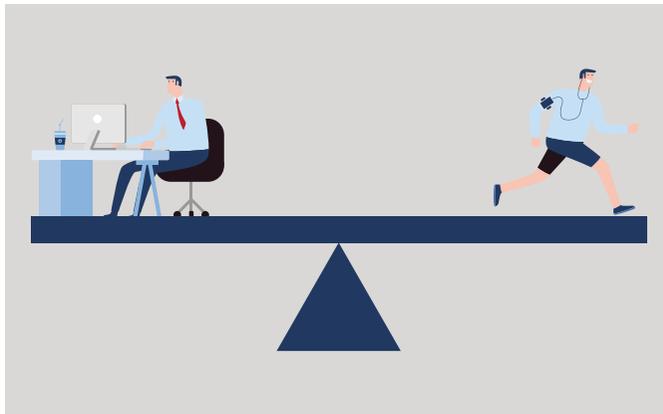
manner of project hierarchy set up. If you can drop some of the usual kerfuffle then you'll get further, quicker, than you thought possible".

- Ensure that all managers have contact with their direct reports at least once a day. The pandemic has exposed the advantages and limitations of different management styles but staying connected through remote working is an imperative for staff wellbeing and performance management
- Trusting people to a greater extent than before is a core component of improving performance and some managers are seeing this for the first time. Universities must keep giving genuine autonomy to staff to make decisions and consciously move away from a culture of passing the decision 'up the line' because of nervousness around blame or because of over-engineered business processes: "As Steve Jobs said, why would we hire great people and then tell them what to do?" Try to encourage a business-focus amongst the staffing base, moving away from the notion that cost reduction measures are somehow

borne out of spite or greed instead of necessity. “Unless our university has hidden plane loads of students due to fly in from Asia then our finances have to be planned on an entirely different basis for the 3-5 years. It’s going to challenge the numbers and types of people we can afford and raise constant questions about what we can do more economically and effectively through online platforms”

Ultimately, our conversations with HR leaders in higher education revealed a group of professionals who were equally tuned in to the perils of the coronavirus for their institution and the needs of their staff for flexible and adaptive leadership, clear messaging and a desire to

be ‘treated like adults’. There was widespread recognition that the financial implications of Covid-19 will apply a set of pressures upon HR to play a leading role in organisational change, not merely through the legal and technical processes behind cost reduction but through involvement in sophisticated business design and configuration. As one HRD put it, *“the time is swiftly coming where we need to abandon the message about doing more with less to accept is that it’s time to do less with less...that’s a difficult conversation for the university to have but if not now, when? For some of us, the coming years are going to more about survival than anything else and HR’s role is to make sure that we’re genuine partners to the business during that process”.*



Crying Out for Clarity: Unpacking the Prospect Experience in the Wake of the Covid-19 Crisis



Felicity Gasparro shares original research findings from a survey of prospective undergraduate students considering their university options in the wake of Covid-19.



Felicity Gasparro
ASSOCIATE CONSULTANT

The Perfect Storm

The storm clouds had been on the horizon for the 2020 undergraduate recruitment cycle long before Covid-19 ever emerged.

With the number of available recruits at the bottom of the demographic dip, set in the context of increasingly challenging financial times for HEIs, 2020 was already going to be incredibly competitive with universities striving to fulfil as many offers as possible.

In the run up to the end of 2019 there was increasing scrutiny of the methods being used by universities to secure the best students, and it was widely reported that the Office for Students had warned universities to 'not use inappropriate inducements' to lock the highest achieving students into opting for their institution as their top choice.

A news story published by the BBC in January 2020, which focused on the impact on UK universities of government funded Chinese students, highlighted a rise of 34% of Chinese students choosing to study in the UK in a five-year period. The Chinese financial contribution is key to financial

viability due to recruits paying two to three times more than the typical UK undergraduate.

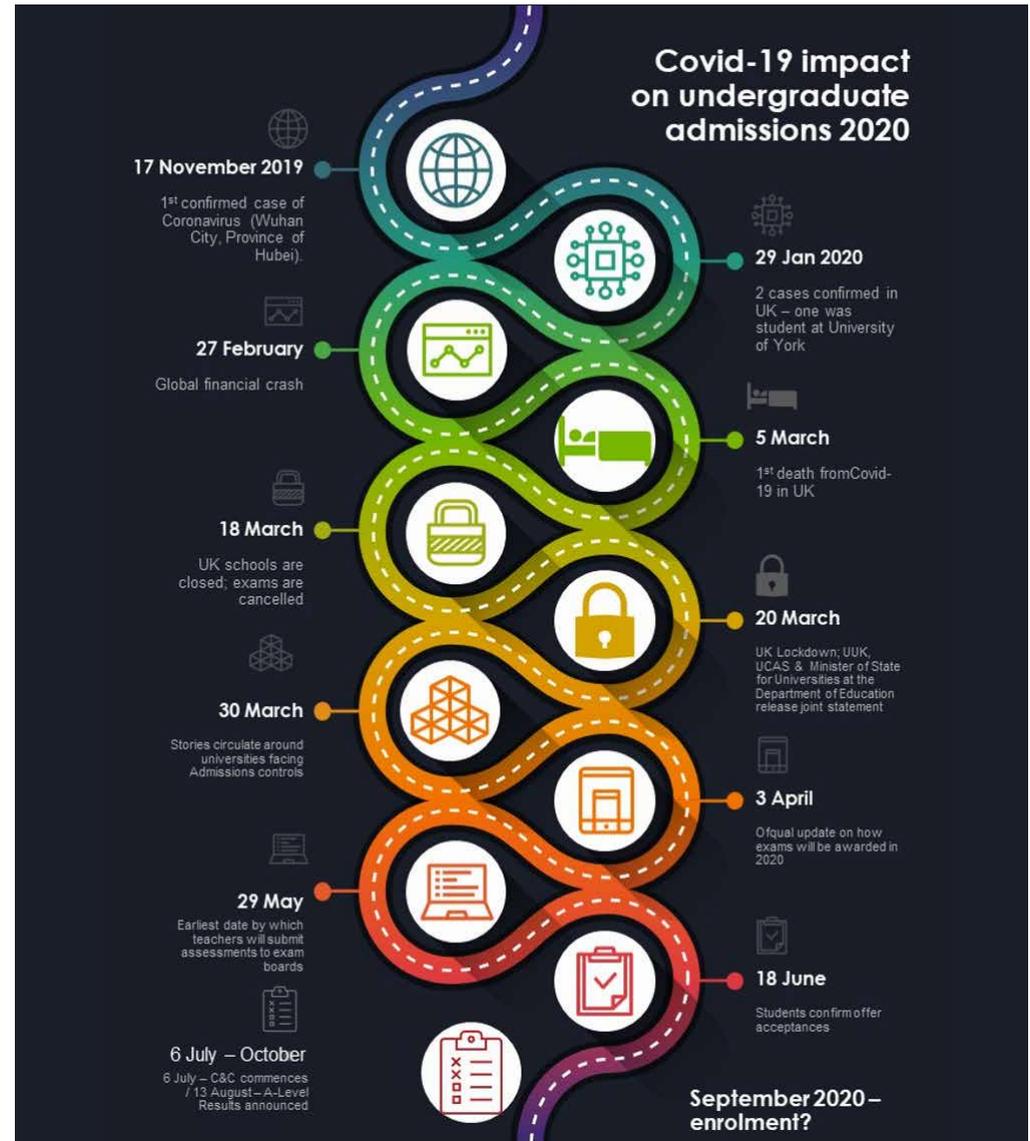
Brexit would be likely to have an impact on the decisions of EU students to study in the UK, at least in the short term.

Validating the criticality of getting the recruitment cycle and admissions process right for 2020, SUMS Consulting had been engaged by several member and non-member institutions to evaluate and optimise their recruitment, admissions and clearing processes, keen to fine tune well-trodden paths, ensuring they were ready to receive, process and enrol applicants.

The Paradigm Shifted Overnight

The plans and strategies that had been formed by universities were impacted with the arrival of Covid-19 when GCSEs, A/S and A-Level exams were cancelled on 18 March. It was apparent that what was already a pivotal year for university recruitment and admissions would become even more so because of the pandemic.

Policy decisions have since been taken about how Year 13 A-Level students will be assessed, and the past performance of students, their teachers'



judgement and mock exams will inform the grades awarded. Gavin Williamson, Secretary of State for Education, has stated assessments should be: *'...fair, objective and carefully considered judgements of the grades schools and colleges believe their students would have been most likely to achieve if they had sat their exams, and should take into account the full range of available evidence.'*

Sums Consulting's Research

Further to the change of approach to examinations SUMS Consulting has conducted its own survey of a small sample group of randomly distributed current Year 13 students, who until a few short weeks ago, were preparing to sit A-Levels in the Summer, 79% of whom were working towards securing a university place in September 2020.

UCAS and Ofqual have updated students and schools on the approach to this year's examinations, but for the young adults on the receiving end of this complete change of direction, how does it really feel, and what do they need now from schools and universities to make the next five months as stress-free as possible?

Although a certain level of information is in the public

domain, students are still feeling in the dark and as though they have lost control over their ability to perform and earn their place at university. News stories which suggest there may be caps to university entry to level the playing field add to further student anxiety, although perhaps this would likely be good news for some institutions.

Our Approach

We approached our research through three lenses:

1. How students were being supported by their schools, and whether the schools were equipped to help by the emerging decisions and policies;
2. How universities are reaching out (or not) to applicants, and what is helpful and / or unhelpful about this;
3. What could be put in place now by schools, universities, or other agencies to help alleviate the pressures being experienced.

About Our Sample Group

32 A-Level students participated, and of the students surveyed they were applying to a broad range of UK universities. The top first choice institution was Bristol, the top second choice institution was joint between Liverpool and Sheffield, and the

top third choice institution was Birmingham. From the sample group 28% were hoping to study Law, 12% aiming to study economics, 9% psychology, and 9% marketing, management, business related degrees. All responses were anonymous. Note, we did not survey students working towards vocational or technical qualification.

Our Findings – Reaction to the Cancellation of Examinations

Our sample of students were largely disappointed not to have the opportunity to sit their exams in the summer, with 69% feeling negative or very negative about this decision: *"I'm really annoyed*

by the cancellation of exams. All my revision and plans have gone to waste."

63% of students felt they could get support from their Head of Year if needed, whilst 37% did not. From our sample, 72% of students were aware of the changes to the university admissions processes, but 25% were not: *"Just feel I will get no sense of satisfaction or achievement from this whole experience – Covid's fault, not anyone else's."*

Confidence in Securing a Place at Their First-Choice University

We asked whether students felt

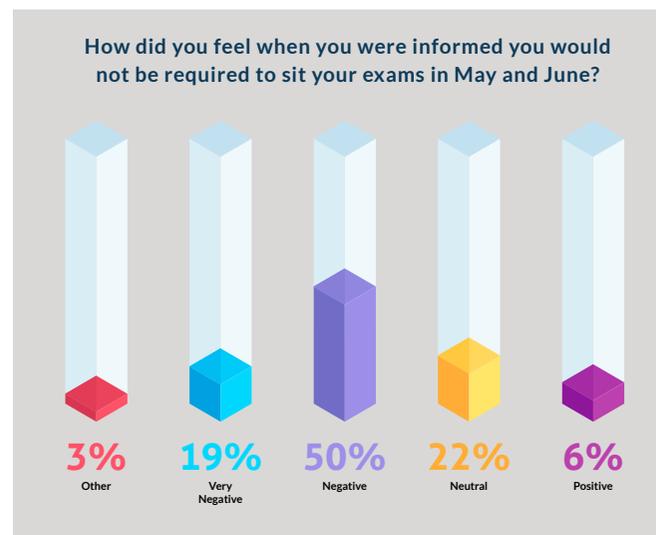
confident with the approach to exam assessments, and this was more hopeful, with 28% feeling very confident or extremely confident, and 44% feeling somewhat confident.

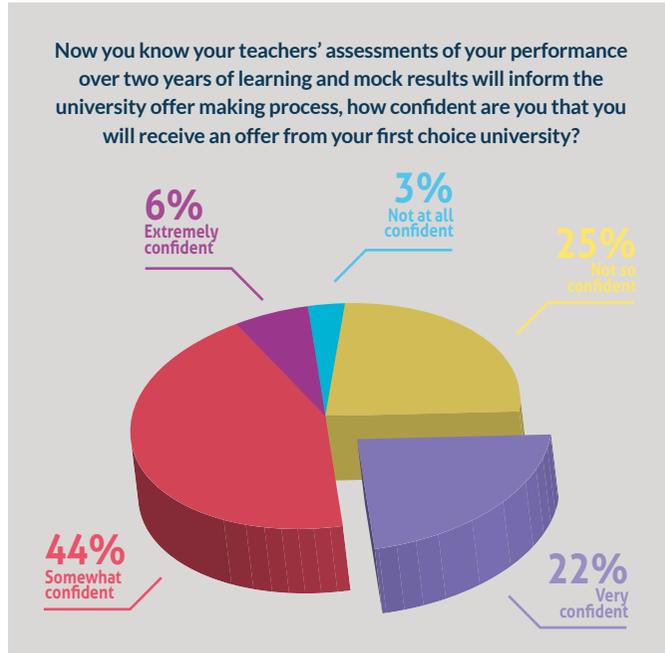
Nevertheless, 28% were not so confident or not confident at all, and when we drilled into this by asking whether, if they were not confident, they had discussed this with a teacher and what advice had been received, we detected an undertone of deep concern about the coming months from some students.

Students and Their Teachers

Most students had been able to discuss their concerns with a teacher, although 5% said they had not. There was a sense that the 'teachers will do their best' for their students, but a frustration that they could not submit additional work to supplement the decision-making process.

Reassurance was an obvious but key offer from the teachers, and several students reported they had been told not to worry, and that they would secure the place they deserved. There was also some commentary that the teachers themselves had limited information about what would happen next, and this exacerbated the anxiety of the





student base: "We need to know that the teachers know what they are doing and what will be asked of them."

The New Awards Process

More than half of the students polled wanted greater clarity over the way in which their work will be assessed, including detailed visibility over the decision-making process with a clear timetable as to when key activities would occur, the appeal process, and the opportunity to re-sit: "Give us a final answer as

soon as possible as waiting for the offers is just an added stress with everything else going on."

"It is a bit confusing what will happen if we are not satisfied with the grade we receive. Many of us want to start university in September 2020 so how can we retake exams by then? And does that mean we won't get a place at the university we like because our predicted grade wasn't high enough?"

There was a marked concern over the weighting of previous exam

results (GCSEs and mocks), where students felt their performance in their A-Level exams would have been far stronger.

"I know my mock results are of much lower grades than I would have got in the exams. I have discussed this with some of my teachers, however they cannot change those grades..."

"There is a lot of conflict concerning the manner that exam boards decided to award their grades. As previously stated, GCSEs should not be a pre-determining factor as it is something which occurred in the past... Some students are able to develop their academic abilities over two years..."

Although our own survey shows a degree of optimism by students that they will still get into their first-choice university, a larger survey sample conducted by 'The Student Room' highlighted 66% did not feel they would receive fair grades this summer.

Stress and Anxiety

With mental health a key area for concern during the education of young people of university age, we recognise schools and universities will be putting in place strategies to support students who already identified

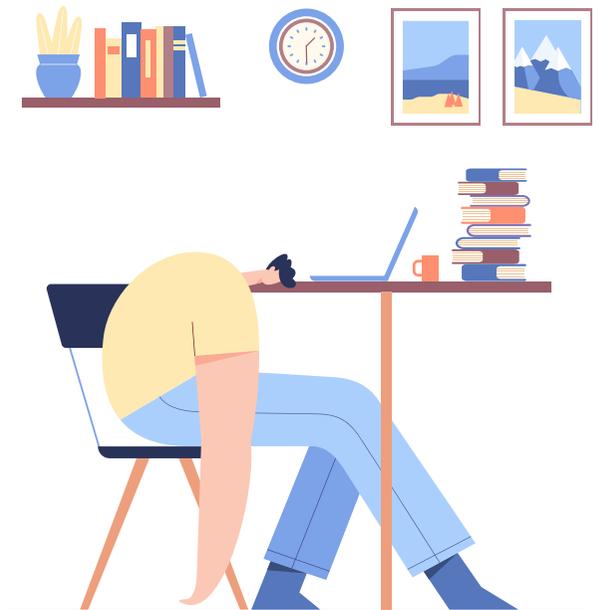
as vulnerable, or who are displaying signs of distress. This is made more challenging given the lockdown arrangements, but with virtual contact methods available we recommend that schools and universities put out proactive and clear channels for concerned students to seek reassurance and information. The proactive sharing of online resources and clear signposting of who to contact either at the school or the applicant's university would be advantageous, and as a minimum, schools and universities could signpost links to

services highlighted by the Office for Students.

"I think it's more stressful than older people think it is for us." "Very unsettling especially with applying to medicine, I have already sat extra exams and had multiple interviews. Finally get offers and everything is thrown up in the air. It is such an unsettling and uncertain time."

The Role of the Universities

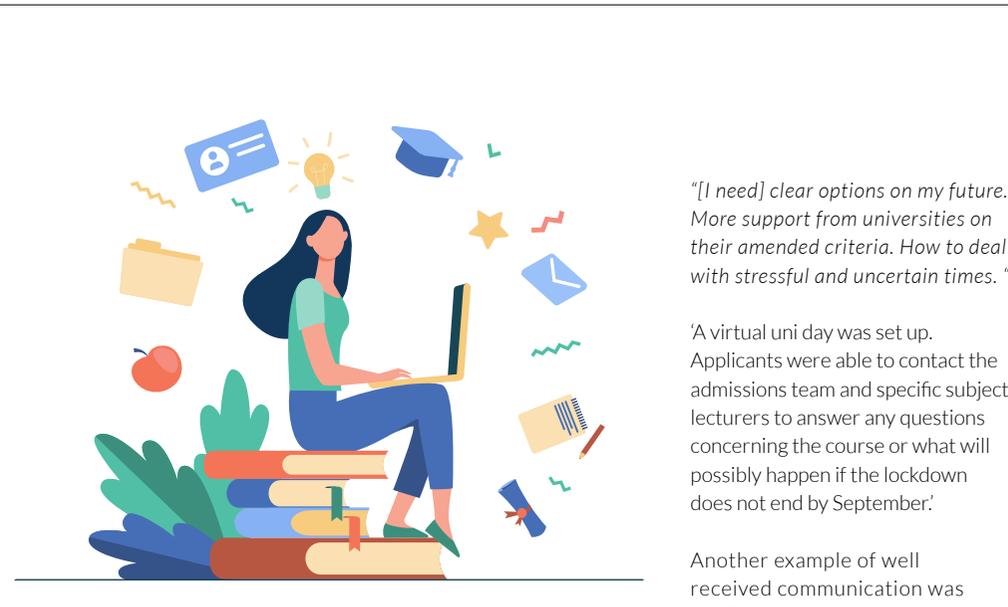
We asked the sample group a few questions relating to what they



expected and needed from their chosen universities and what they have seen the universities they have applied to do so far.

87% of universities had been in touch with applicants. However, in a small minority of cases this was highlighted as lacking or poor by some students. As the host institution responsible for receiving results, processing and matching applications, and enrolling students, as well as delivering Clearing, student expectations of the role played by the university is as demanding as of their school or college. There are parallels here, in that they

want universities to be clear and transparent about the offer-making process, setting out detailed plans and delivering enrolment at pace after exam boards have confirmed grades: *“Inform students how they will be supported in the process and provide information as to how the university will be making decisions.”* Students want clear access to the right person to respond to any questions they may have. More than 50% of our respondents highlighted email as the best channel to use for regular communication, but some admissions teams will have the capability to run multichannel messages, ensuring



“[I need] clear options on my future. More support from universities on their amended criteria. How to deal with stressful and uncertain times.”

‘A virtual uni day was set up. Applicants were able to contact the admissions team and specific subject lecturers to answer any questions concerning the course or what will possibly happen if the lockdown does not end by September.’

Another example of well received communication was confirmation by universities that unconditional offers would remain unconditional. For a small proportion of our participants, they can look forward to enrolling as normal.

If Universities Could Do One Thing to Improve the Situation

We asked our survey sample how universities could make the single biggest difference. These were:

- Sharing clear and timely information
- Not making rash judgements
- Keeping things moving at pace and minimise the gap between awards being made by exams boards, and university offer making
- Keeping in touch and good, clear communication
- Providing advice on what to do if grades are not met, how this

students are reached. Due to the changing circumstances it seems students want more contact from their chosen universities at a far earlier point. Some students also called for a dedicated telephone line: *“To actively update on any developments occurring with the grade or entry requirements.”* *‘Stay in touch with students as it is causing great anxiety to a lot of us if they take a long period of time to consider our applications.’*

‘Emails providing information and updates as to how they are responding to the events, how they expect these to affect us, and what sort of support will be provided in these uncertain times.’

Like schools, students highlighted the need for consideration

for reassurance and overall student wellbeing. Although the responsibility clearly does not lie with the universities at present, compassionate communication and engagement is essential and could be a determining factor in whether a student chooses to attend an institution or not. Straightforward and honest communication is also preferred. One student had received an email from their chosen university stating it would be ‘...as generous as possible with offers and be flexible given the circumstances.’ One student highlighted Northampton as having taken proactive steps to connect with applicants and provide that important bridge of contact. Other universities have been taking similar steps and these have been very well received:

works with the offer process, and perhaps more clarity over Clearing

- Information on deferral or reversing the decision to defer because a gap year was no longer viable.

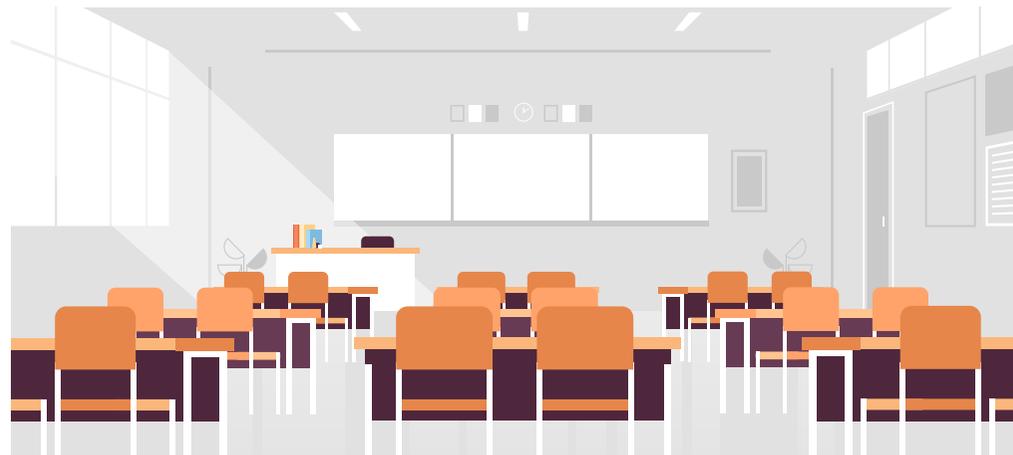
In Summary

Universities, schools, and colleges; UCAS, Ofqual, UUK, OfS and the Department for Education all have large tasks and responsibilities in hand. Working through the creation of sound and viable policy decisions at pace, and with fairness, objectivity and care at heart is an unenviable job, especially when there is such a large degree of ambiguity about the future, and many impacting factors are out of their hands. This said, the commitment to do things well and in the right way has been made. Key dates regarding consultation, teacher assessments, offer acceptance and 'results day', have now been made clear.

Some may read this report and have a reaction that Year 13 students need to take more responsibility for their own destinies, and to become more resilient. Those with that view may point to the wealth of useful information available through UCAS and gov.uk, with many universities using their websites as channels to share updates.

Perhaps greater resilience will be an unintended consequence of Covid-19, but right here and now, it's worth remembering that these young people, some of whom are still not legally entitled to vote or get married, most of whom are still living at home, haven't had the benefit of the A-Level exam experience to help get them ready for university. This rite of passage is a key ingredient to becoming ready to move away from home and take real ownership for attained results and the impact on their future. Many of these people are feeling even more out of control of their destiny, and their need for clarity and speed comes from a point of trying to regain a little of what they have lost. One student stated concern over not knowing how they would refer to their A-Level results in future CVs – and in the future, they will always be 'the 2020 Covid-19 cohort', who didn't get to sit their exams.

Clear, timely, detailed (where required) pragmatic and empathetic communication is the single most important component that universities can strive to deliver right now, alongside ensuring admissions processes are fit for purpose and ready to receive results. Two participants make this point clearly:



- *“Only two of the five [universities] I applied to [have emailed me]. These are very unknown circumstances now so it’s hard to criticise them for not being in contact, but it would be nice to have some more communication about the processes and changes from the universities themselves.”*
- *“Due to the nature of these times, the universities that have demonstrated themselves in the best light have been the ones who have contacted and supported prospective students and offer holders. Universities that have provided no information have left students in uncertain positions, only made worse by the inadequate information from the government and examining bodies.”*

Universities that understand the students’ perspective well and are putting measures in place to reach out to their prospects, and truly lean in to creating a positive pre-results experience, will be likely to reap the rewards of their efforts in the 2020 recruitment cycle.

Even though much of the detailed information regarding this cycle is still unclear, just allowing an applicant to ask the question and hear that there is no answer yet is better than the student not being able to ask the question at all. Although current research by UCAS and YouthSight shows 90% of Year 13 students are still planning on enrolling at university in September, these are strange and changing times, and without

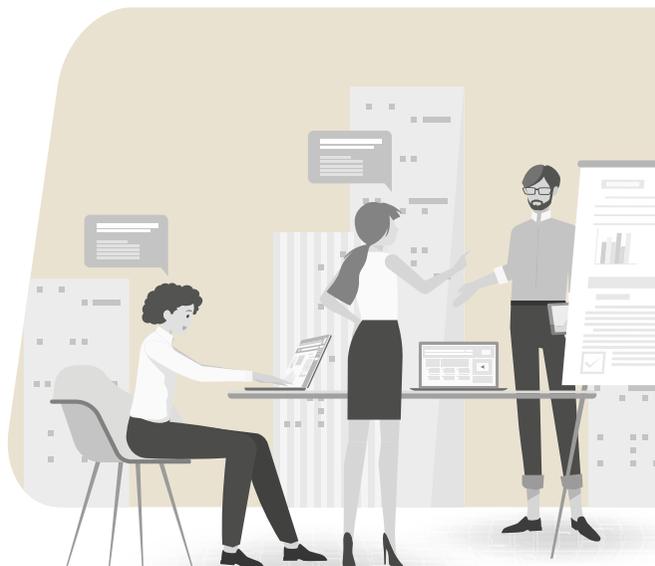
greater clarity on what the next few months will look like, universities need to be working even harder now to try to keep their prospects engaged. We are aware that many universities are beginning to scenario plan for the September term to begin virtually and not on campus until January 2021. A report published by McKinsey highlights how our counterparts in the US are predicting the next 12 months+ will play out and is worthy of the attention of strategy makers in UK universities. Our own research showed that 21% of respondents are planning for a 2021 enrolment.

How, precisely, will the possibility of not ‘opening for business in September’ impact on enrolment?

Maybe a surge in deferrals, perhaps an uptake of international students prepared to study remotely (but visa restrictions may impact on this intent), or possibly the UK undergraduate deciding to simply defer – why sacrifice the full university experience, when they can stay at home and wait things out? This savvy subset of Millennials and Gen Z-ers could choose to swerve the academic route completely and select different employment routes through the crisis. The question universities

need to use to challenge their response strategies with is: how do they make their proposition so attractive that the students will resist just going into paid employment / the gig economy (insta / influencers / bitcoin?).

Covid-19 has made the already perfect storm more treacherous, but not insurmountable, providing universities remain willing and able to step into the shoes of their prospects and truly connect with what matters to them most right now.



Harnessing the Winds of Change: Transformation during Covid-19



Fola Ikpehai shares insight from her research into the implications of the pandemic on change management and transformation.



Fola Ikpehai
PRINCIPAL CONSULTANT

The Traditional Change Pathway Versus the Covid-19 Change Pathway

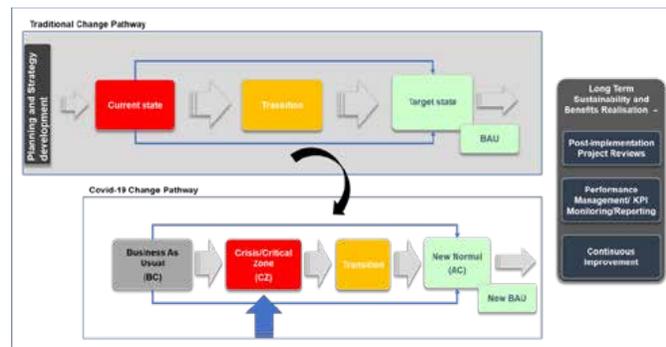
Programmes of change can be triggered in a number of ways:

- **Vision-led**, developed to deliver a clearly defined leadership vision, top-down in approach, and with cross-cutting implications across the university;
- **Emergent**, developed from a realisation that the coordination and streamlining of projects is necessary to deliver sustainable change and required benefits – ultimately evolving into a ‘vision-led’ Programme; and
- **Compliance-driven**, resulting in ‘must do’ programmes that are initiated in response to an external event, where benefits tend to be expressed in terms of avoidance of negative implications. In compliance programmes, stakeholders of

the change have limited ability to control or influence the pace of the shift.

The Higher Education sector, like all other sectors across the UK and beyond, is going through unprecedented change as a result of the Covid-19 pandemic. In effect, each university is in the middle of a massive and intense compliance programme that is driven by the need to change societal values, lifestyles and behaviour with an impact on practically all operations and elements of service:

- Relationships with stakeholders (with a specific focus students, academic and professional staff)
- Work patterns
- IT systems
- Business processes
- Roles and responsibilities of individuals
- Organisational structures



- Supply chain
- Vendor relationships
- Culture

Even in a traditional change journey, with a clearly identified target state, compliance programmes are the most challenging in terms of the user experience. The Covid-19 change journey is in no way traditional; it is a crisis management response to an extraordinary event, as depicted in the diagram below left.



However, whether traditional or brought on by crisis, the ultimate goal of any change programme is to achieve long-term transformation and ensure that expected benefits are realised. The transition from the red – the ‘current state’ in the traditional pathway and the ‘crisis/critical zone (CZ)’ in the Covid-19 Pathway - require the same change management tools, and the same level of change leadership.

Higher Education Change Teams: Form, Function and Role in Covid-19 Planning

Evidence from the SUMS Change Management Community of Practice indicates that the remit of change teams differs across the sector – more so than some of the more fundamental functions within higher

education. With a few exceptions, change teams have shown a stronger focus on strategy development, and programme and project management (the technical elements of change). This is as opposed to the people-side of change management (such as communication and engagement, change impact, skills audits and re-skilling, business readiness, culture change and continuous improvement).

As a result of this diversity in form and function - as well as the fact that traditional change management has gone out of the window - the role of change teams in response to the current Covid-19 Pandemic also differs from one university to another. Teams appear to fit into two camps in relation to change

leadership and influencing: teams that are active during this time and those that are *passive*.

Active change teams are those that have been involved in working with their strategic leadership teams to define and implement the strategy-for-change adopted by their institutions during the pandemic. These teams are involved in Covid-19 planning, major incident and business continuity groups, and in coordinating and/or informing the messages for internal communications delivered by university leaders. They are also involved in facilitating management development during this period to enhance the skills needed to manage remotely, and through uncertainty.

Passive change teams on the other hand are those who, in the current crisis, are the recipients of change – along with all other stakeholders. Most universities we spoke with operate at various points along this spectrum, but in the main, towards the passive end. This suggests that the sector is not currently geared towards getting the best out of their change teams.

Current Impact of Covid-19 on Change Management

Communication and engagement
It is perhaps understandable that institutions went into Covid-19 planning largely without formal consultation, engagement and involvement, with operational decisions made and changes deployed quite quickly in response to the crisis. As a result, it is also not surprising that there have been some issues to overcome as people have adjusted to the short-term measures put in place. Members of the SUMS Change Network have noted that while many people are excited and adapting well to the new ways of working, others are either not complying or struggling to adapt.

"Actions taken as a Leadership Team (positives and negatives) will be remembered long after the Covid-19 crisis.", said one university change manager.

A positive attribute of this imposed change in ways of working is the enhanced communication from strategic leaders highlighted by all change managers. Strategic leaders are communicating the rationale for all decisions, and providing updates on progress and developments on a regular basis. This has been critical in building transparency and trust, managing expectations, and driving positive behaviours and compliance.

As members of the SUMS Change Network put it:

"The coordination and integration of our communication has been revelatory. We have integrated messages around people, process and technology. We have focused communication on 'the business' rather than here's a finance message, here's a HR message etc., and we have deployed these messages on a regular basis."

"People have responded to this streamlined communication. We've had over 80% click-to-open rate on daily Corona-update emails – increased from between 10% to 15% for any email communications before Covid-19."

"An important element of the 'senior leadership' live stream briefings was that staff were able

to pose live questions and vote for those that they wanted answers to. This was very useful and important in terms of staff engagement and providing reassurance."

There are other examples of good practice where change teams have launched staff surveys to see how people have adapted to the new online environment and outcome-focused work environment. There is also one example of a change team who have deployed resources to meet (virtually) with representatives from each team across their university as part of a deep-dive into current thoughts and feelings. This is in order to begin planning the 'After Covid-19 (AC) Digital Transformation

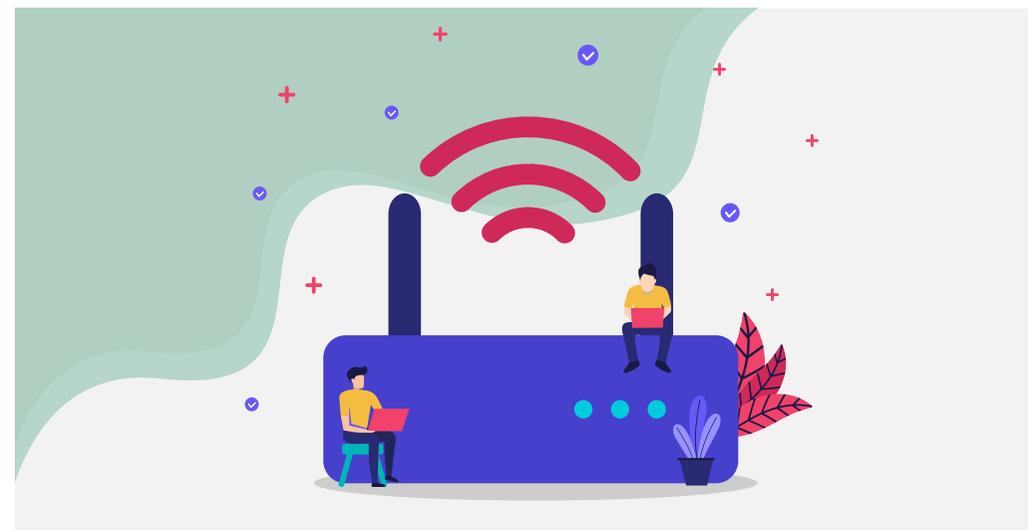
Road Map'. Results from these conversations are being fed into Human Resources, Internal Communications and the senior leadership – a great example of a university seeking to capitalise on the learnings it has experienced from the crisis response. In addition to gaining intelligence for future planning, feedback also suggests that these conversations have helped staff to feel 'less disconnected from the university environment during this period'.

Covid-19-Driven Reprioritisation of Portfolios, Programmes and Projects

The 'new normal' will inevitably mean the use of more digital

tools, enhanced flexible working, promoting results/outcomes focused leadership, and enhanced communication. This has meant a reprioritisation of pre-Covid-19 portfolios-of-change. Change managers highlight the use of MoSCoW or similar analysis of programmes and projects in order to define the priority of their existing portfolio (*Must Do – in the short, medium or long-term, Should Do, Could Do and Will not do (or Will only do against a specific scenario, or as part of a review linked to a future need)*).

While programmes and projects that change teams have been involved in during the Covid-19 crisis zone vary from institution





The Role of Change Teams in Transition

"We can't plan. We don't know when the new norm will occur or what the new norm will be. But we still need to be ready for it when it arrives."

Conversations with university change teams have highlighted a number of scenarios against which university strategic plans are currently being developed. These include:

1. A return to normal for the Autumn Term of the 2020/21 Academic Year (September 2020); which could include a blend of online and on-site teaching and learning provision

2. A delayed start to the Autumn Term 2020/21 but with some on-site teaching and learning expected this calendar year
3. A delayed return to normal from January 2021
4. Full online provision until the start of the 2021/22 Academic Year

While in the main, change teams have not been at the forefront of the current operational shifts being made in response to Covid-19, they are likely to come into their own as universities transition back to a new normal 'business as usual' after Covid-19. Change managers will

need to refocus the organisation and the people in the transitional phase and beyond as universities move from uncertainty towards a focus on more traditional planning.

For change managers in the sector this presents an interesting challenge. However, there is a recognition that in some cases, this will require a strong element of re-branding and profile raising to move the change functions from the passive to the active end of the influencing spectrum. There is also a recognition that change teams themselves may need to

change in order to facilitate this Covid-19-driven transformation, while ensuring that road maps are developed that can be adapted to meet any of the above four scenarios.

"We can see our roles (as change teams) changing in order to take advantage of the opportunities that will be presented following Covid-19"

Questions that change leaders expect to be exploring during this phase include:

- What has changed between business as usual (BC) and the crisis zone (CZ) across all areas of change potential?

- How has it changed?
- How do you feel about what has changed?
- How do your stakeholders feel about what has changed?
- What has worked well and what hasn't?
- What do we need to keep from the changes we have undergone in crisis?
- What are the critical success factors for the short, medium and long-term?
- What actions are important to deliver against these critical success factors?

"We still need to do the transformation - Covid-19 was just a catalyst. The comment 'That won't work for my team' has been blown out the window."



Opportunities and Long-Lasting Changes Emerging as a Result of Covid-19

"The staff community has shown an interest in exploring how we can work in a more sustainable and environmentally friendly way - Covid-19 has shone the light on this potential."

Change teams are currently considering how their universities should develop and adopt principles to enable the harnessing of digital tools - hoping that out of this crisis can come some positive learning and accelerated use of tools,

ultimately leading to more flexibility and less reliance on office space.

To embed opportunities that have arisen on the back of Covid-19, building digital capability will be critical and will include:

- Fostering an increased confidence in the use of IT and digital tools introduced during the Covid-19 pandemic to enable new ways of working
- Developing and promoting an understanding of digital standards, policies and procedures
- A commitment to continuous process improvements based on digital capabilities
- Adapting to change and understanding stakeholder needs
- For leaders, building an understanding of the need to manage by outcomes – supporting staff to work remotely

Coaching and leadership development will become more critical to enable the establishment of high performing teams in the new working environment that will emerge after Covid-19. There are also good examples of student coaching – not just linked to their academic skills, but also lifestyle coaching, that institutions may want to enhance to help

students to cope following the Covid-19 crisis.

As universities move to a new normal, change managers need to build on the strengthened engagement from the Crisis Zone – ensuring empathy, and understanding that people will be at different points in their individual change journey. Change teams will need to deploy appropriate resources to support stakeholders and facilitate movement along the change curve – from resistance to the new normal working environment, through to exploration, acceptance and finally gaining new confidence.

The reality for most universities is that this experience of managing through the crisis has simply been the start of their business transformation and change journey. A combination of financial pressures and the changing expectations of students in the wake of Covid-19 will challenge universities to refocus their businesses, diversify their income, adapt to digital first working and service delivery, and rebalance their workforces to meet their new shape and size requirements. Our sector's change management community will be busy for some years to come!



Putting Students First in a Post-Covid World

Helen Baird and Jeannette Strachan share insight from their research into the implications of the pandemic on student services.



Helen Baird
PRINCIPAL CONSULTANT



Jeanette Strachan
PRINCIPAL CONSULTANT

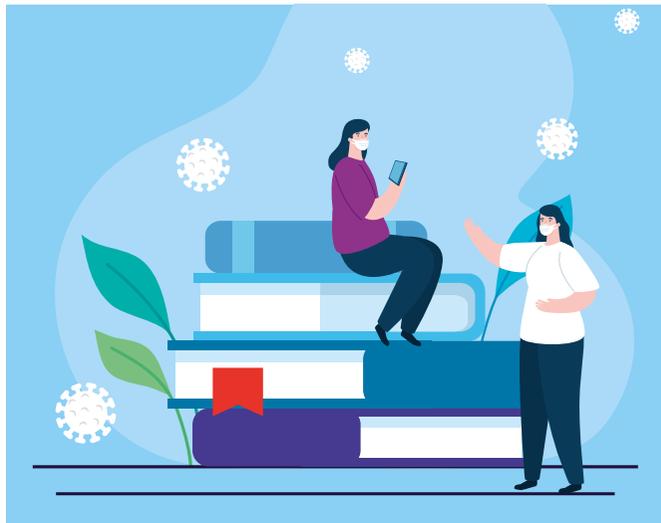
Student services directorates deliver a complex set of functions and comprise staff from a variety of professional backgrounds and with specialist skills-sets. Functions vary across directorates, but often include essential services such as counselling, mental health and wellbeing, disability support, sexual misconduct and harassment support, student communications, student finance, careers, chaplaincy and residential life.

Many of these service areas have had prominent roles in supporting students through this crisis to date and will continue to do so. Student services teams

have responded well. This is unsurprising since they are used to working in uncertain contexts where “they need to be reactive and creative in anxiety-driven situations”. Staff have demonstrated adaptability and resilience in embracing different ways of working, as student support services have moved rapidly and seamlessly from a predominantly face-to-face service to exclusively online delivery.

Immediate Response to the Covid-19 Outbreak Identifying and Supporting Students Overseas

When the then emerging Covid-19 crisis began to impact



university student support services in mid-late January, the immediate concern was for students overseas in high-risk countries: China and Iran and later Northern Italy. Some institutions realised quickly that they did not have a single, authoritative data source on where students are at any one time. Instead, information was spread across multiple departments and systems or did not exist. Most students overseas were on organised placements or exchanges but not all were where they were expected to be, with some having gone off on fieldwork or travelling. Others had left their university in the UK temporarily, but had not informed anyone of this, such as Chinese students going home for New Year.

Consequently, identifying the location of all students was time and resource intensive and relied heavily on self-reporting by students to piece all the information together. Only then could staff provide practical and financial advice where needed to help students return to the UK, including those from affected areas. Some students remained stuck overseas or had to remain in self-isolation on their return in student housing, while others chose to remain in

their placement country. As time went on, the situation escalated quickly from university support staff being able to respond to and manage individual students’ circumstances as they ran out of capacity to do so.

Managing Students on Campus

By late February and early March, universities had moved into crisis management mode. Attention had turned to implementing social distancing on campus and large gatherings and one-to-one contact with students by tutors and support staff had stopped. By mid-March, support staff were focussed on persuading and supporting students who could leave campuses to do so in the run up to the lockdown on 23 March.

Although most students had left by the end of last term, an estimated 10-15% of students remain on many university campuses and are unable to leave. These include students with special circumstances, such as care experienced students or those estranged from their families, as well as stranded international students, mature students with families and postgraduate research students who live on campuses year-round. Although the levels are expected to decrease as more international

students are repatriated, there are still significant numbers of students living on virtually closed campuses in many cases.

A skeleton staff is in place to support students still on campuses. Staff members are providing security, limited catering mostly as a takeaway service, resident support and in some cases foodbanks. In some institutions, staff are helping to organise virtual social events for students, alongside the efforts of students’ unions and peer supporters. Support teams are also monitoring students known to be more vulnerable, such as those who have registered a disability, including long-term mental health conditions or specific learning difficulties. Some universities, including Keele and Staffordshire, are also providing wellbeing support for healthcare students working on placement in the NHS, including nurses and paramedics.

Support for Students in Financial Hardship

Another area where support teams had to move quickly was in responding to students’ financial hardship, whether they had gone home or remained on campus. Focus had been on providing equipment to enable students to access online learning and

support, either by loaning or setting up hardship funds to provide laptops and Wi-Fi dongles. There has been surprise at the high numbers of students without internet access at home, and those who only have smart phones for accessing their online learning materials.

Additionally, many universities have waived the final term's rent in university-owned accommodation or provided discounts to students still on campus. However, students in privately owned accommodation are not having the same benefit, with many remaining liable for rent even if they have returned home. Moreover, many students have lost their part-time jobs and main source of income.

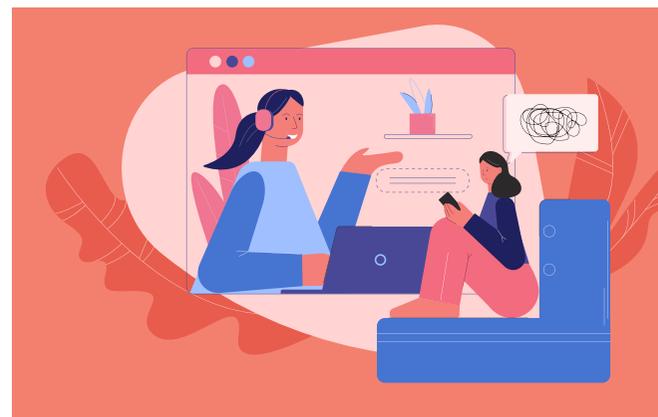
As such, student financial hardship is a live issue and **NUS are now campaigning** for a safety net including a £60 million national hardship fund to support students and those graduating this year. The Scottish Government announced a **£5 million package** of emergency financial support in early April to help students facing hardship, and a far higher bar was set by the **Canadian government** in providing over £5 billion for students and recent graduates, through loans and grants and

a universal monthly benefit. The **UK Government support package** announced on 4 May included provision for HE providers to use existing funding (of £46 million) to boost hardship funds for students in financial difficulty and for disadvantaged students impacted by Covid-19. However, so far, there has been no direct financial support package for students in hardship from the UK Government.

A key challenge for universities will be to help mitigate the effects of inequality among students, which are being exacerbated as the lockdown continues. Students need money for essentials like food and rent as well as access to laptops and connectivity to enable their learning. Additionally, they need access to adequate personal space and conducive environments to be able to study and learn, which are highly variable.

Moving Staff and Services Online

Among the universities in our sample, once the decision was made to send students home where possible, student services teams moved rapidly to set up remote working for staff and put infrastructure in place to move support services online. The



move from predominantly face-to-face student support services to exclusively online delivery took between just three days and two weeks across the universities we spoke with: *“on the whole, students support services have moved to new ways of working fairly seamlessly.”*

Organisations such as BACP and the University Mental Health Advisors Network were quick to encourage staff to move to online and telephone counselling. This accelerated the process by helping to alleviate concerns staff had such as over lack of training in online counselling and confidentiality issues. The biggest initial challenge was organising hardware and software for staff to use at home.

Student Demand for Counselling and Wellbeing Services

A key function within student services is counselling, wellbeing and mental health support. Students already receiving counselling are continuing to do so via video sessions. Mentoring and emotional support is also being offered through different types of delivery, such as 20-minute check-in telephone sessions and signposting students to self-help tools and resources. While all these virtual services are essential at present, the longer-term outcomes of online delivery are of course not yet known.

From when universities closed until just the beginning of the final term, all the universities in this sample had seen a decline

in student demand for mental health support services, though only at the lower end of the risk spectrum. The successful move to online services in some cases could only have been achieved alongside this drop in demand. For some, this decline could be explained by reduced levels of students' exam and assessment anxiety and 'a drop-off in more trivial issues', with students less focussed on day-to-day worries and pressures of university life. Others may also now be receiving support from their families, networks, and support services in their home area (although accessing NHS care for their conditions will be more challenging).

However, universities are still supporting the smaller proportion of higher risk students, including both those who remain on campus and others who have gone home but are known to have more severe illnesses and or difficult circumstances.

Most of the student service directors we spoke with expect this pattern of low demand to be temporary. They expect that demand will rise in coming weeks and months as students are affected increasingly by feelings of loneliness, isolation and



disconnection. Some students will also experience bereavement or illness themselves through this period. There is also a real concern that students beginning to experience difficulties may not be seeking out help at an early enough stage, leading to more significant problems in time.

As one director put it *"I have been struck by differences in demand for counselling and disability advice, but as time rolls on I expect mental health issues among students to increase substantially"*. Another director disagrees however and believes the narrative that large numbers of students should expect to feel unwell because of the pandemic is being overplayed, and indeed that this message may be unhelpful for students.

Student Demand for Disability Advisory Services

The situation has been different with demand for disability advisory services within universities. To begin with, there was a lot of anxiety among disabled students about exams and assessments being reformulated online, leading in some cases to disability services being overloaded with enquiries: *"demand skyrocketed leading up to the end of year exam period"*. Now that students are better informed about how this will work, levels of anxiety are settling down and disabled students are benefiting from online study skills via online platforms such as MS Teams which have record and transcription functions.

Moreover, most of the directors highlighted the benefit for disabled students of moving exams and assessment online, and thereby making them more accessible for all students. Some universities already had widespread inclusive teaching practices and the move to online assessment enables inclusive and accessible assessment as well. As one director pointed out *"this situation has added impetus to a level of change that was going on anyway"*. On a more cautionary note, another director is concerned that not all reasonable adjustments needed are in place for disabled students, and that some will be disadvantaged through this crisis.

Careers and Employability Services

Many of the services provided by Careers staff were already offered online as well as face-to-face, in particular careers guidance, start up support, reviewing CVs and application forms and providing mock interviews. However, the uptake of the online services has risen considerably in the light of recent events. One of the issues that Careers Services are experiencing, and indeed experienced prior to the current situation, is that online support can take longer than a face-to-

face conversation e.g. responding to an application check by email rather than in person. Internships which involve students working on an employer's premises are not possible at present and virtual internships are being explored with employers.

Group work and teaching is proving the most challenging. This is for a combination of pedagogical, technical and staff confidence reasons. However, up until now there has not been a compelling reason to deliver online and so staff are having

to adapt very quickly to a new situation. There is a recognition that there needs to be sufficient staff training in place to support online delivery (including use of technology, how to present, how to make sessions interactive, how to react to an audience that might be muted, etc.).

One of the biggest concerns is for large scale events such as careers fairs. The experience of virtual fairs is that in the past students have not engaged with them to the same degree as physical fairs.

Some Careers Services, in place of fairs and employer presentations, are offering employer webinars. The current crisis has encouraged Careers Services to extend their reach and offer



opportunities which did not exist before. This is including in their programme a greater diversity of recruiters from the UK and from around the world, including alumni. In addition, the move to student consultancy projects which can be delivered remotely, means that there is far more scope for international opportunities. So for example a student who wants to work in China could undertake a project with a company there and a student who wants to work in the United States could participate in a webinar from a company recruiting for positions in that country. There is also the opportunity to hold virtual events and include students from other universities, in other countries. Careers Services are working to increase their visibility with

students via social media and student e-mails supported by programmes of blogs, vlogs and webinars. They are also working with other teams in Student Services to co-ordinate a wider message to students and graduates about the support that is available over the months ahead.

Directors of Careers Services reported that ACGAS have provided valuable resources during this crisis to support careers staff including webinars and information on the current situation.

The Near Future

The initial period in the run up to and immediately post the lockdown was fast paced and a huge amount of effort went into moving universities' student



support services online. Most universities seemed to take the Easter break as a natural breakpoint, with some closing for up to one week or providing staff with additional leave to recharge. There is a desire now to return to business as usual and ensure that current services can be sustained over the next period until the summer break.

Some of the areas which student services teams are now focussed on during this final term include the following:

- Renewing university **policies and protocols** such as on control of infectious diseases, dealing with student and staff deaths and assessing mitigating circumstances.
- Finding ways of providing **additional wellbeing support remotely** to students to help alleviate feelings of disconnection and isolation. This includes providing small group sessions and drop-in activity by counselling teams, and in several cases rolling out online resources like [Big White Wall](#).
- Considering how to deliver aspects of the **student experience and university life** through extra-curricular activities for students. Others are looking at how best to support students in

practical and community ways, to maintain their sense of belonging to the university and allow for moments of celebration. Graduating students had to pack and leave very quickly and it will be important to enable a ceremonial finish for them.

- Providing support to **students graduating this year** as they enter what will be a difficult job market, by working creatively in engaging with employers to understand the implications for recruitment of this year's graduates and arranging virtual internships and placements. Recent research by Prospects shows a worrying picture for final-year students. Nearly two-thirds feel negative about their career prospects and many have already lost part-time jobs, internships and graduate job offers.
- Planning for the next academic year is in progress, with student support teams thinking about how to best support **student transitions**. For instance, school leavers will be far less prepared for university this year. How can universities support young people moving away from home and ensure a positive transition for them? Since it is difficult to imagine Freshers' Weeks happening in the same way, regardless

of whether intakes are purely online or staggered, ideas are being developed for online induction activities. Some thinking is also going into how this experience may change people, where they may find it difficult to re-integrate after social distancing and how best to support this. Consideration is also needed as to how to identify students who are not engaging to provide them with additional support.

Areas of Effective Practice

All the directors we spoke with felt their universities have responded well to the Covid-19 crisis overall. Some key areas of effective practice highlighted during the interviews are shared below.

Governance and Decision Making

Leadership teams are seen to have taken an agile and risk-focussed approach, setting up major incident response teams and infrastructure quickly enabling student service teams to be fleet of foot in response: *"the pace and rate of decision-making has shifted at all levels during this period"*. This is considered a real positive. Some directors emphasised the importance of more centralised decision-making for clarity and consistency.

However, this has been well balanced in some cases with a willingness by executive teams to listen to expert managers and empower them by delegating authority as far as possible within their respective remits.

There has been no time for the luxury of allowing all stakeholders to have their say on a change in the usual way. Consequently, decision-making has been faster and more top-down than in normal times. Decisions which would usually be consulted on extensively through a process of iteration and sign-off in the committee system, have been made quickly and effectively 'sometimes in an afternoon', using chairs' action where sign-off is required. Normal structures are expected to be re-introduced over the summer term although key decisions are likely to continue to be made by small senior teams.

Communications

The need for clear and coordinated communications across all levels of the university are essential. A single authoritative source of clear information to students is required so that key messages do not get lost in translation: *"you do need to have centralised communications in a crisis"*.

Another learning point is that communications need not be overly finessed, instead the sooner key messages are relayed the better. Moreover, it is essential to inform the right people across the university prior to major communications being relayed to students, so that support teams can be prepared to scale up for the resulting increase in enquiries likely to follow. In one university all telephone enquiries to faculty or school information hubs have been re-directed to the central university hub team who then field them as needed. This has worked well in helping ensure consistency and clarity and reducing duplication of effort. Clearly, it is also important or communication to be a two-way exchange and for universities to listen to their students as well.

Collaborating with Students and Students' Unions

Student services leads emphasise the need to work collaboratively with the student body and students' unions to ensure the university is highly responsive to students during this time. Where a positive relationship already existed between the students' union and the institutions this has proven to be particularly effective during the pandemic. Many of the universities are



the ability to communicate quickly, the time pressure we are working under has broken down the territories".

At Staffordshire, this has extended to improved working between academic and professional services units, with some of the school deans inviting members of the student services team to participate in debriefing sessions for academic staff. Such initiatives have progressed a more functional approach to student support across central services and academic units.

Improved Working Across Functions and Teams

Many student services teams are finding they have started operating more effectively across professional service boundaries. For instance, there are examples of disability services teams working more closely with centres for academic development or support than in the past, especially to support the move to online learning and assessments. Additionally, one director highlighted the need to work closely with other parts of the student support network across the university, such as the chaplaincy and students' union: *"all these support teams now know how each other operate and have*

involving student presidents or students' union chief executives in senior daily meetings, which is beneficial not least because they receive a lot of enquiries directly from students. The University of Leeds has gone further, and the students' union has been the vehicle for pushing out many key communications to students on the University's behalf.

Recognition of the importance for students of keeping themselves up to date and remaining connected is vital. Working with and enabling students' unions, sabbatical officers and peer support networks to provide this information and support is essential.

Supporting Staff Wellbeing

Mental health and wellbeing of academic and professional services staff has been rising up universities' agendas in recent times anyway, amid concerns about increasing workplace stress. The impact of the Covid-19 pandemic may well exacerbate existing pressures, not least amid concern and uncertainty over the renewal of temporary contracts and potential future redundancies.

Many staff are still as busy with workloads but are also now managing childcare and coping with the effects of lockdown on themselves and their families. Additionally, where teams already had capacity issues these

have been exacerbated as recruitment is not possible at present.

During this period, it is important for universities to continue to support and connect with staff now working from home, and those still working on campus providing support services to remaining students. There is a need for a greater level of communication and connection, and this is being achieved through more frequent online meetings and check-ins. Workloads and the impact of delivering services online need to be monitored, and staff need to be well supported and encouraged to switch off from work at regular times.

Opportunities for Long-Lasting Changes

The experience of responding to the Covid-19 pandemic has made student service directors think differently about service delivery once universities re-open and in the longer term. Some of the potential long-lasting changes suggested are set out below.

Online and Flexible Working Practices

There is a clear opportunity to be more flexible in future with how people both work and study. We have seen “overnight changes

to ways of working, culture and practice” across universities. The notion of many administrative functions in future operating a Monday to Friday nine-to-five service will come increasingly under the microscope. This experience may result in some student services providing more flexible late evening and weekend services benefiting students, even where this is just operating an online chat facility to support students out of traditional office hours.

Service teams will be much more inclined for certain activities to be done at home now that this is clearly a viable option and they are used to engaging virtually. Now that the infrastructure is in place and former barriers to change overcome, staff may be more likely to work from home at least partially, thereby reducing the time, costs and environmental impact of commuting for them. In time, there is the potential to free up office space, create capacity for increased service levels and reduce costs for universities.

Blended Service Delivery

It would be difficult to overstate the scale of the overnight change in student services delivery in the past few weeks. “*This experience has been transformative*” as one director described it, another

says “*this has shown that nothing is impossible, no-one would have believed a few months ago that all student services could move online.*” For another director there are “*massive silver linings and no going back for student support services. There will be blended delivery of face-to-face and online services in future.*” While universities are likely to remain face-to-face organisations, there are also opportunities to help

build communities and support students effectively online.

Consequently, high demand services including **disability advice teams** and **student counselling and mental health support** could see real change in the future, potentially moving to blended delivery. There are opportunities to increase online and self-help support and engagement with students,

including rolling out peer support programmes with online elements. Additionally, many university counselling teams have been at capacity for some time and have already or were in the process of looking at different ways of meeting the year on year growth in student demand. The traditional approach of offering a set number of counselling sessions has been difficult to sustain in many institutions





due to sustained growth in demand and space constraints for one to one sessions on crowded campuses.

Student services directors believe that this experience has shown it is achievable to deliver effective telephone and online advice, guidance and counselling to students. An important caveat of course is that the outcomes of telephone and online counselling support for students will have to be monitored and evaluated to see what works before changes are embedded. The effects of delivering these kind of

services online on staff also need to be considered. Further to this, there is an opportunity to move some current paper-based processes online, such as students reporting of adverse circumstances and student disciplinary procedures. The latter can be very lengthy processes, sometimes taking place after students have left the university. Some Student Conduct Offices are now looking at how to run a disciplinary procedure online. If universities can get this right, it will help avoid what are common and often stressful delays for students

as their cases work through the system.

Inclusive Practices in Teaching and Assessment

The necessity of moving to online provision of teaching, learning and assessment during the pandemic has been positive for many disabled students. Many universities have already or were in the process of mainstreaming common learning adjustments and building more inclusive practices into teaching and learning across the whole institution. Moving to more general provision means a reduction in the need for individual adjustments to be implemented once a disabled student identifies themselves to the institution and their needs assessed.

However, within some universities there has been strong resistance to adopting online teaching and assessment practices and in others the rollout has been very slow. The need to respond quickly to the pandemic has meant that *“inclusive teaching has been delivered in one fell swoop”* and the view that *“three-hour exams are essential has been blown out the water”*. Universities will now be looking at other opportunities

for using digital technology to support teaching and learning, and how best to translate these back into the classroom in the future.

Co-creation of Services with Students

There is also an opportunity for universities to actively listen to their students to fully understand what has or has not worked well for them through this crisis and co-create future services with them. More research and engagement are needed with current and future students to find out what they want the landscape to look like going

forward as we being to look beyond the pandemic.

Most student service directors do not expect universities or individuals to remain unchanged by the experience. We will *“now have a Covid-19 generation”* predominantly among Generation Z students, who are already quite different to previous generations. Therefore *“a whole new way of thinking is likely to be needed post-hoc”*. More research will be required on how to support students of different types and with a variety of needs, and how this support can be delivered consistently.



Conclusions

We can assume from the discussions with this sample of university student service directors that most student service teams, at least in the traditional university part of the sector, will be sufficiently resourced and mandated to be providing virtual support to their students well in these challenging circumstances. Indeed, the Office for Students' briefing note [Supporting student mental health](#) concluded that *"staff in many universities and colleges have responded quickly to the need to deliver mental health support in different ways, and students and students' unions are showing resourcefulness and resilience in helping their peers."* However, there is at least a risk that some smaller institutions and alternative and FE providers of HE may be faring less well and are insufficiently resourced to be able provide the same levels of support to their students.

Throughout the crisis, university student services teams have relied heavily on informal networks and professional membership bodies such as AMOSSHE, ARC and AGCAS to share information and good practice. Some participants felt that there may be opportunity to coordinate and facilitate these conversations in a more systematic way. As well as the decisions by

the UK Government on the big questions of financial support to the sector and for students in hardship, it will also be important to achieve a level of consistency across the sector, not least on when the next academic year will start. Likewise, up to date guidance is needed on a whole variety of more practical issues, such as the use of sector datasets from this year, how Tier 4 visas will apply in the current circumstances and ensuring that online assessments for disability support allowance will be accepted.

The longer the lockdown period and social distancing go on, and especially if next academic year is at least partially disrupted as well, the more likely we are to see longer term changes within student services in universities. Every institution will be affected financially and there are already concerns about the impact on budgets for student support in future across the sector. Although budgets will already be set in most institution for next academic year, there is a big caveat to this. A clear positive and unintended benefit of the pandemic has been increased recognition of the importance of student, and to a lesser extent staff, wellbeing at all levels within universities.



2020: A Space (and Timetabling) Odyssey

Claire Taylor MBE and Andrea Buttle share insight from their research into the implications of the pandemic on timetabling and space management.



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This area has been the topic of many a conversation amongst SUMS staff and colleagues in member universities and is highly interwoven with a number of other themes on which SUMS will be publishing briefing papers.

Last week saw the publication of the piece on **Digital Education and Assessment**: it's well worth a read alongside this piece on timetabling and space management, as the models of pedagogy and assessment that universities will use heavily influences academic space and the way it is managed.

This paper outlines the impact of Covid-19 on the process of timetabling, the timetable itself, and the way that academic space is used, both in transition and in the "new normal". There is a section on the impact on wider space use, including a challenge to institutions to think about space as enablers of activities, as places where people come together to co-produce something. This extends to digital space as the place people come together and links both to digital education and other work that we are doing on digital service delivery.

Here we focus on the physical: the rooms and buildings, the corridors and paths that connect

them, the formal patterns of use represented by the space management and the timetabling processes and how we can support the more informal uses of our physical campuses. So, let us start with the large-scale impacts on the estate as a whole, before looking at specific types of activity we want to support, then specifically looking at the impacts on timetabling and access.

The Context of the Estate

There have been large scale building works on most campuses recently as universities invest in physical infrastructure to support expanded teaching provision, open new Schools and research institutes or invest in new student services (e.g. hubs and sports buildings). Building works due to come online for September 2020 should have entered their final few months of the build process: completion of construction and handover into use.

The impact of Covid-19 has been to reduce activity across building sites and in some cases halt work altogether; Estates teams will have been working hard with contractors to mitigate risks and reschedule work. Where institutions have expected new facilities to be available for

teaching in October, they might only come online in December or early 2021.

Refurbishment projects will be under review as well. Some may have been brought forward if Estates teams feel that safety can be ensured and there are advantages to completing projects whilst the campus is quiet; others scheduled for this summer may go ahead or be delayed until 2021 for safety or financial reasons.

SUMS expects financial challenges to have an impact on capital expenditure projects well into the medium to long term.

The impact of delayed handover and/or dependence on unfit space may be mitigated by institutions choosing to teach remotely in Autumn 2020. There may also be a reduced demand for space based on reduced student numbers should teaching remain face to face as well as change in demand for space where broadcast teaching activities remain online in an acceleration of the flipped classroom movement.

Impacts

- Uncertain space availability for timetablers and space managers



- Financial penalties for Universities if they chose unilaterally to postpone capital projects
- Poor student and staff experience if using unfit space
- Increased demand for high quality, flexible, small group teaching space over the medium-term (see below)
- Significant pressure on specialist space in Spring 2021 potentially leading to longer teaching weeks and increased evening/weekend building operation.
- Remaining uncertainties
- Extent of delay to new-build handover
- Whether scheduled refurbishment (summer 2020) can go ahead
- Impact of delays to capital projects.
- Opportunities
- Potential financial savings could be made by deferring refurbishment projects to 2021 or later
- Refurbishment projects could focus on conversion of office space to agile space
- Revisit Estates Masterplans in the light of reduced demand for large lecture space.

Academic Space Use

This time of year is usually very busy for timetabling teams. They will be producing draft timetables based on last year's timetable, updated with information on new courses, changes to the estate and student option choice collected in April. Data on returning students is generally stable and progression forecasts will be fairly accurate. There is significant volatility for timetablers now: let us take student numbers for starters. Forecasting incoming student numbers has been harder in recent years: underlying changes in demographics are the easy bit, whilst marketisation, changing conversion rates and the impact of clearing, more difficult.



Whilst some institutions, with good information management, have brought together number projections and timetabling data improving clearing tactics; at others, timetablers have been scrambling to fit large cohorts resulting from "success" in specific areas at clearing. Now, in the midst of Covid-19, we expect uncertainty in student numbers to be fourfold:

1. Variance in international & EU student numbers (this will be clearer come June 2020)
2. Variance in numbers of UK applicants seeking to defer entry
3. Variance in numbers of current students seeking to "pause" their studies
4. Variance in mode of study



(students choosing to study online due to shielding).

This is of course on top of low numbers of 18-year olds in the UK home market and the impact of Brexit on EU students. Moving on from student numbers, there is uncertainty in modes of delivery. The sector has moved quickly to upload learning and assessment materials to VLEs and has delivered teaching activities through Teams. A number of institutions, for example Manchester, have already stated that a proportion of teaching activities in Autumn

term 2020 will remain online whilst others will return to face to face.

For others, changes to modes of delivery for September are not yet clear: we may see September 2020 starts cancelled with cohorts starting in January 2021 or courses mothballed for a year (think postgraduate courses where international students make up more than 50% of cohorts). Those universities which already support large scale January and April starts will have the advantage over those with only one entry point (think

year-round support for teaching throughout the summer and flexible timetabling and course approval processes).

Our paper on [digital education](#) talks about the clarity required to define what the timetable needs to support next year:

- Do teaching events need to be collocated (where people are gathered in one place as opposed to dispersed or dislocated: where people are not in the same place)?
- Do teaching events need to be synchronous (where people complete an action at the same time as opposed to asynchronous: where people complete an action at different times)?
- Do teaching events need to be interactive (where there is two-way, or more, interaction between teacher or materials and participants as opposed to broadcast: where there is only one-way communication)?

Thinking Out Loud

Nick Skelton has been working on a series of papers related to digital education. Let us explore some of his thought experiments to understand the impact on academic space use, starting with simple teaching events like Economics lectures before moving onto more complex things

like chemistry labs or drama performances.

Large Scale Lectures

Economics 101 has 250 students attending in a tiered lecture theatre with a maximum occupancy of 280. To socially distance once inside the space, occupancy would have to reduce to 20-25% so in this case around 60 people. Reducing occupancy to under a quarter would also allow students to leave, socially distanced, in the same amount of time as a full lecture hall (based on fire standards). However, that is assuming that there's space for them to go out into, that is not already filled with students waiting for the next lecture (see section below about enabling space use). There would also have to be reductions in frequency of use if lecture spaces required cleaning between cohorts.

SUMS recommends that lectures (collocated, synchronous, broadcast) are replaced with digital, on-demand content (dispersed, asynchronous, broadcast).

Chemistry Labs – 450 second year chemistry students are in labs two days a week. Cohort A is on the ground floor in Physical, cohort B on the 1st floor in Inorganic and Cohort C is on the top floor in Organic.

Everyone swaps round at the end of the eight-week teaching block. Lab spacing is good, use of safety equipment and ventilation from the fume hoods reduces transmission risks.

Here the highest risk is not in the academic space, it is in the supporting spaces. Our students will need to get onto campus, into the building, use toilets, each lunch, get some fresh air. What can we do to reduce mixing of cohorts and transmission risks outside the lab spaces?

Can specialist space be utilised in a short fat block structure? This is a pattern used in many professional post graduate programmes. Each cohort has a four-week block of intense lab work (four days a week) and other activity is delivered remotely, reducing traffic on campus and in the building. Another option is to increase the working week and stagger lab start times to reduce footfall in shared spaces (changing the activity to collocated, asynchronous and interactive).

Drama and Performance – 100 drama students take part in practical activities which involve acting, singing, dancing and high levels of physical interaction. Activity is collocated, synchronous and interactive. Transmission risks are high for

these types of activity. Risks can be mitigated by locating activity outside or in large well-ventilated indoor spaces and spacing participants, but this won't work for all activities.

Looking outside of the sector, one solution that presents itself is clustering (think professional sports teams or care home clusters). Could students be placed into performance clusters? Could one group of students work together, live together, socialise together for a period of time? A high level of trust is required. If unfeasible, we may have to postpone performance activity to a later semester, rescheduling performance modules and reworking progression processes.

Conclusions

- Move all lectures to digital delivery, on demand, to reduce demand on the physical estate and free up slots in the timetable to provide flexibility for other activity
- Determine what learning must be interactive (e.g. activities in drama, sports studies, dance and nursing). Postpone these activities to a later semester in the course.
- Determine what learning that is interactive and collocated but can be done asynchronously (e.g. science



lab work). Construct the timetable around those. Consider distancing, ventilation, physical barriers, and personal protective equipment to reduce risk.

- Use intensive teaching weeks and intensive teaching days to reduce the number of occasions when students need to travel to the university
- Interactive teaching events such as seminars and tutorials could be delivered either

digitally or physically. Provide both physical and digital access routes to the same activities so that students can choose their mode of engagement.

If teaching on campus does start again in September, we recommend timetablers are informed about trends in enrolment to understand forecast variances. Where passive broadcast activities remain online, module leaders



may focus contact time on smaller group activities. This will decrease demand for large group space, increase demand for small group space and reduce event sequencing constraints. A level of agility is required which is counter to traditional timetabling practices. Senior leadership teams need to provide clarity in terms of when students will return to campus, which cohorts will be prioritised and which activity types will be taught face to face, but they in turn are dependent on government and advice and the future nature of the pandemic. A wicked problem indeed!

Impacts

- Changes to which semesters/terms modules are taught in
- Reduced utilisation of all space in the short term
- Potential reduction in space demand where activities are already double taught or where there are multiple small group sessions
- Reduced utilisation of and demand for large lecture space
- Increased utilisation of and demand for small group space.
- Remaining Uncertainties
- Class sizes (related to student numbers volatility)
- Demand for space (related to movement of curriculum online and potential reduction in offering)

- Availability of some space (related to delayed build projects).
- Opportunities
- Comprehensive clean down of the timetable, reducing no-shows and improving utilisation
- Getting timetablers involved in information sharing and subsequent decision-making
- Exploring increased agility in timetabling based on digitisation of information sharing.

General Space Management

Given the assumption that many universities will suffer revenue loss related to Covid-19, it is worth recognising that after staff, the next biggest cost for most is their estate. There are opportunities to reduce space costs in the short and medium term, but these depend on the location and context of each institution.

Information on fluctuating demand levels for research and teaching space is sparse so decisions should be delayed. However, office space is known to be an underutilised overhead for most institutions and utilisation, even before Covid-19, averaged around 50%. Given people have adapted to working from home and some will not wish

to return to commuting in the short or medium term, there is an opportunity in the short-term to reduce occupancy to enable social distancing and to reduce office space in the medium term for both administrative and academic staff, probably by half. Universities will have to prioritise which members of staff return to campus first:

- Operational staff to ensure the campus is fit for purpose
- Academic staff with research which is time-pressured or requires specialist space or equipment
- Professional services staff delivering front-office services to staff or students.
- It may be that proportions of professional back office staff do not return to campus at all.
- Similarly, to digital education, we can think about the advantages of digital service delivery and consider the types of activity that we want our space to support. In the longer term, we see a reduction in transaction type activity spaces and an increase in high-quality, co-productive and creative spaces. In the short-term, transaction style spaces must be screened and contact time reduced to lower transmission risks.
- In order to realise cashable benefits, the university must

be able to repurpose or release this space. City universities may have leases that are coming up for renewal or the opportunity to sell-off/rent out estate. It may be more difficult for campus universities: these have a fixed space envelope. They may be able to achieve savings through mothballing space for a period of time or they may be able to repurpose space use or reduce future build programmes.

Impacts

- Demand for office space will reduce in the medium term
- Space occupancy might reduce in the short term to accommodate social distancing
- Provision of study space for students who do not have such space at home
- Staff/student consultation spaces will need to be screened.
- Opportunities
- Potential for fixed-cost reduction through releasing office space through an agile approach
- Digitisation of administrative processes – Go Paperless!
- Reductions in presenteeism – staff choosing physical or virtual presence depending on the situation rather than a default of “always physically present”.

Enabling Space Use

It is not just the single spaces that we must think about, it is the way that spaces are connected, how people move between them, and the services which exist to ensure that the space is useable.

Access

In the short-term many universities will be looking at controlling the number of people allowed on campus and reducing movement of people through and between buildings by reducing face to face contact. Receptions will not be staffed, and access control will be by card or key. Corridors and staircases could be made one way to reduce cross overs and where rooms have more than one door, separation between entries and exits. In the longer term, institutions could start to think about designing in touch free access to buildings and services. Remember the first iterations of campus cards: magnetic stripes and grainy photos. Mag stripe cards are less secure, require more contact and are less hygienic than modern solutions. Smart cards are more secure but still require contact to prove identity or approve a service or payment transaction. Proximity cards are contactless but can still be hacked. There are more secure options which enable

contactless service and payment provision for example mobile credentials (e.g. Apple Pay or mobile Student IDs). Mobile credentials would reduce the queue of incoming students waiting for their smart cards in Freshers' Week and would reduce ongoing transmission risks associated with service provision and access control.

Touch Points

What are your most frequent touch points on campus? We would guess that these would be related to doors, toilets, self-service devices at the library, the buttons on water dispensers and so on. What can we do to minimise touch and therefore minimise the requirement for continual cleaning of these points? What can universities do in the short term to restrict access to services? What can they do in the longer term to design in contactless access and service provision?

Impacts

- Increased cleaning costs associated with high volume, high touch, areas.
- Opportunities
- Eliminate touch points in high volume areas such as toilets, printers, cafes, entrances
- Automate door opening at key entry and exits points.



**Knowledge Economy:
Experts are Back in
Fashion Thanks
to the Pandemic**

Bernarde Hyde shares insight from her research into the implications of the pandemic on Research, Enterprise and Innovation within universities.



Bernarde Hyde
CEO

Context

Before Covid-19 hit, Research, Enterprise and Innovation (REI) in universities was already facing a very challenging couple of years. The Research Excellence Framework (REF) 2021 was looming with universities investing significant resources in preparation. The UK had just left the EU on 31 January, following the ratification of EU/UK agreement by the EU with the UK entering a transition period, set to last until 31st December 2020.

REF

Last month a decision was taken to put the REF on hold, while institutions respond to the effects of Covid-19. The four UK higher education funding bodies are still at the preliminary stages of adapting the details of the REF 2021. There are two central issues for the revised exercise: the timing of the new submission deadline; and the broad approach to taking account of effects on impact case studies. A survey soliciting views on the issues was launched with a close date of 5 May. Universities are having to anticipate what might happen.

It is noticeable that at the time of writing that the REF website and those of many research-intensive universities make no reference

to the delay but continue to offer guidance as if the REF will continue along the original timeline. This reflects the current approach to carry on with the existing approach as much as possible until there is clarity about what will happen.

Brexit

The transition period ensures that there will be no change as far as UK participation in Horizon 2020 is concerned. The next framework programme – Horizon Europe – will run from January 2021 to 2027. The eligibility of UK-based researchers and businesses to participate has not yet been confirmed. UK participation is dependent on the UK securing 'Associated Country' status. The conditions and timelines for this are not clear, and it is possible Horizon Europe calls for funding may be issued before the UK's Associated Country status is confirmed. This presents more uncertainty.

To make the most of Horizon 2020 opportunities (with the relative certainty about terms and conditions) pre Covid-19, universities were working to ensure as many (suitable) proposals as possible were submitted before the 31 December 2020 deadline.



The Industrial Strategy Challenge Fund

Part of the government's Industrial Strategy, the fund is a core pillar in the government's pre-Covid commitment to increase funding in research and development by £4.7 billion over four years to strengthen UK science and business. While assurances have been given around the funding, post-Covid-19 there is an expectation of a spending review with a contraction of funding as we work towards paying for Covid-19. Pre Covid-19, universities already had a very difficult context

against which to shape and deliver REI strategies.

Strategy

All universities have in place strategies for REI, but typically, the focus now is on the operational; the immediate and the short-term. For example, supporting Covid-19 initiatives, the recruitment and enrolment of Postgraduate Research (PGR) students and the completion of work in progress to secure the expected funding. However, a few universities are taking the opportunity to proactively test their strategies to see if they are still fit for purpose and are

sufficiently flexible/agile to respond to change and able to shape the new normal.

The effect of Brexit, taking millions of pounds of potential funding out of the system, will be compounded by the effects of Covid-19. We will have increased uncertainty around government funding; large funders imposing cuts and most charities (with the exception of those with exceptional endowments, such as Wellcome) reducing their research funding; and the fall in student income. If not already started, there will be a renewed focus on diversification of income with purpose and driving up surpluses from REI activity, covering full costs and understanding the degree of cross subsidy within universities.

Some universities have undertaken, or have planned, transformation programmes that have included, as phase one, an efficiency programme. REI divisions are expecting, if they have not already been reviewed, to be scrutinised for efficiency savings. Many universities operate separate Directorates for Research and Enterprise & Innovation. Some, such as Exeter, plan to re-integrate the two functions with the key driver being the need for efficiencies.

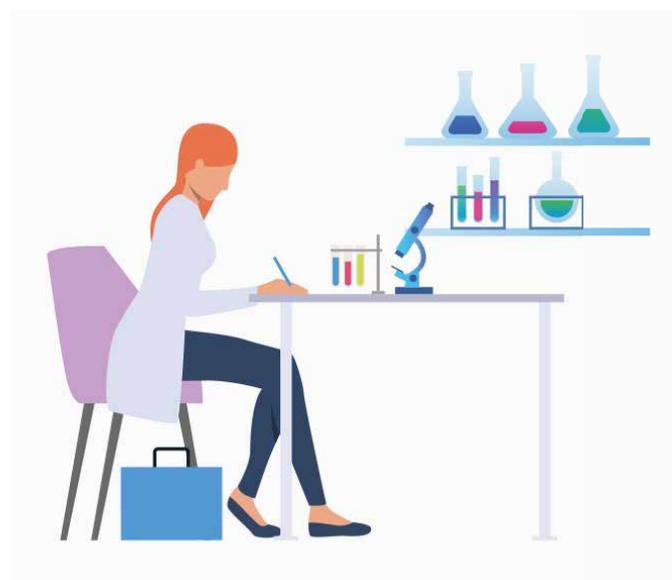
Evidence from a recent SUMS benchmarking study suggests that there are economies of scale to be had from the integration of Research, Enterprise and Innovation, as participants with the highest total FTE count currently operate separate divisions.

Universities when looking at efficiencies from the view of structural change are tying them back to strategy and outcomes explicitly. For example, Strathclyde University has a mission to find solutions to most urgent global challenges and has assigned a high percentage

of REI resources to external facing functions; this external facing profile is in line with their strategic focus.

Over the last decade, we have seen a strategic growth in doctoral colleges, some physical and some virtual. Those universities with virtual colleges are finding themselves well positioned (with mature approaches and infrastructure) as universities have to migrate rapidly to digital learning and support.

Covid-19 Challenges Universities' immediate



challenges are to repurpose their laboratories and facilities to support the national drive to beat Covid-19 and provide PPE and other support. Researchers are responding to the funding/calls for Covid-19 research. Universities with teaching hospitals are engaging on all fronts to provide support. Consequently, some REI areas are under greater, but different pressures. Governance and processes have adapted, are more agile, and are delivering in a much shorter time frame.

Covid-19 is presenting other challenges for REI. Over the medium to longer term, contraction of the economy, and the reduction therefore of potential funding sources, is the most significant. To mitigate this, universities are reviewing their income portfolios and are focusing on how they might influence policy and improve external engagement to get a better return.

The diversion of Government from Brexit negotiations is contributing to the lack of clarity about future funding opportunities and their terms and conditions. Other than lobbying through sector groups, universities recognise that there is not much they can do to

influence the outcome. They are encouraging researchers to submit as many grants as possible before the end of 2020 and target alternative funding sources.

PGR student recruitment and completion rates are expected to fall. To mitigate, universities are moving recruitment, learning and supervision online and extending, for example by six months, completion times.

Staff retention and recruitment has become even more difficult - especially of overseas staff for whom the UK, during Covid-19, is a less attractive location - with some staff choosing to return home and some projects being paused/delayed. Border control across the world has made the departure/arrival of staff problematic and necessitated online induction and remote working, all of which makes it more difficult to form effective teams. Teams are working to mitigate social isolation by using virtual communication channels.

Much work has been put into achieving Athena Swan accreditation and gender equality over recent years, but the crisis is adversely affecting equality and diversity. Already it is reported that fewer research

papers are being submitted by women than by men. This is probably a consequence of the disproportionate load that has fallen upon women during lockdown - the effect is still to work through. There needs to be a recognition and adjustment in future assessment and promotion rounds.

Keeping laboratories and other research facilities functioning to support ongoing projects is essential and therefore a priority, but one that presents challenges in ensuring health and safety of staff, and in resourcing. Some technicians and IT staff are being diverted to support online learning initiatives and produce PPE for the NHS. There will be further challenges around opening up all laboratories and facilities when laboratory teaching resumes. As well as having to manage social distancing, there will be a need to 'catch-up' on this term's/semester's laboratory teaching.

Moving Forward

While addressing the immediate challenges, some are already moving to think about the new normal and what that will look like. There is recognition that whatever the future brings it will not be a return to the old business as usual. New ways



of working will build on the gains and successes that are a consequence of Covid-19 and lockdown. There is recognition of the need for greater resilience to be built into the operating model, specifically, diversity of income and improved levels of surplus. There is also a recognition of the need to focus on areas of excellence and sectors which offer the greatest opportunities and activities that are essential; universities are starting to address the hard questions about what they cannot afford to support and what activities they should stop.

Questions are being asked about how research can best be supported nationally for those

areas where it is difficult to make the case at university-level; if a model, for example like the Scottish model, could/should be adopted in part.

The need to quantify the cost/benefit of investing in an enabling infrastructure - for example how investing in virtual communication tools to support working agilely will allow space and resources to be released - has become more apparent. Initiatives are already underway to explore how research equipment can be shared within and across universities. The need for comprehensive CRM systems that manage relationships and automated workflows to deliver

efficient and timely processes has become more apparent.

A consequence of the crisis that is being celebrated is the recognition of academics as experts and the reconnection of universities with their communities who again are recognising their value and contribution. Universities are looking to build upon this success and the opportunities this offers for REI.

Immediate Adjustments

In the current situation, it is recognised that not all REI and PI/grant team activities can be carried on as they were under the old regime; there is not the same capacity. There is some staff absence, some redirection of resources to support university Covid-19 initiatives, and additional load associated with remote working and the availability. Prioritisation of activities has become more important with the complementary stopping/reduction of non-essential activities.

Funders are taking a pragmatic approach to any disruption to research projects and are amending or delaying submission deadlines, or postponing review panel decisions on grant funding. This has necessitated more

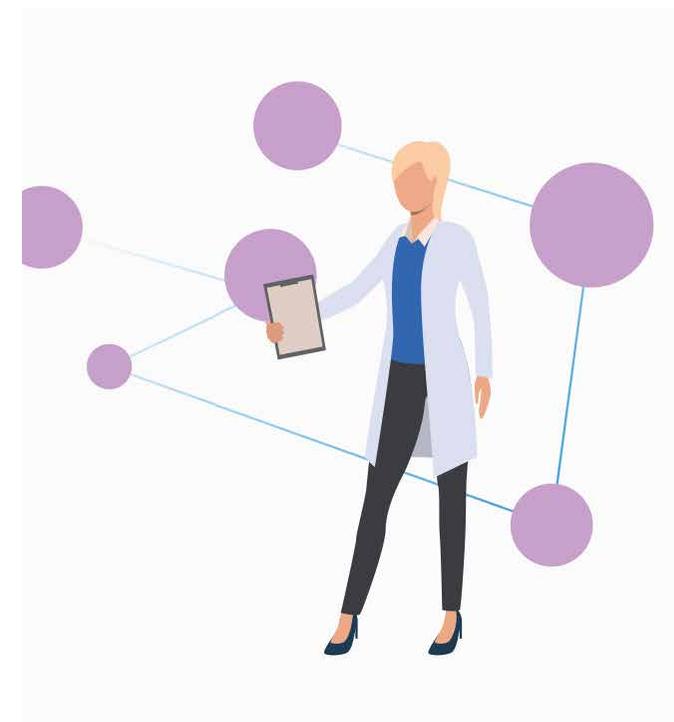
active communications: tracking and sharing.

REI staff continue to deliver core services working remotely; accessing REI and other corporate systems and communicating via Teams and other platforms. Universities that are paper-light, and have in place systemised workflows that incorporate electronic authorisation (signatures), are best positioned to facilitate

remote working, needing little adjustment to the core process. All have made some adjustments, even if it is just, for example, prioritising responding to Covid-19 funding calls.

PGR Student Supervision and Assessment

All supervision, assessment and progression (including Viva examinations and thesis submissions) are taking place online. It is expected that



supervision continues to take place online on a regular basis, which presents a challenge in knowing about and ensuring cover in case of supervisor absence.

Proposal Submissions

Applicants are being asked to allow extra time for an application to be approved. In the absence of systemised workflow with electronic signatures, REI staff are having to adjust core processes to remote working; for example, accepting email confirmation from the relevant approver.

Acceptance of Awards

Principal Investigators are being asked to risk assess the starting of projects and ask if it is necessary or feasible to start as and when originally planned. There are implications for research staff deployment and recruitment; for example, fixed-term contract staff start dates are being cancelled or delayed, as appropriate.

REI Contracts

The review and drafting of REI contracts continues remotely - with the engagement of partners - to ascertain the impact of Covid-19. Existing contractual obligations are being explored in light of dependencies with a view to mitigating risk and

exposure. Given the high number of contracts, prioritisation processes are being put in place; processes that reflect the highest degree of risk and exposure due to non-compliance. Lessons learnt from the exploration of existing contracts will inform future contract drafting.

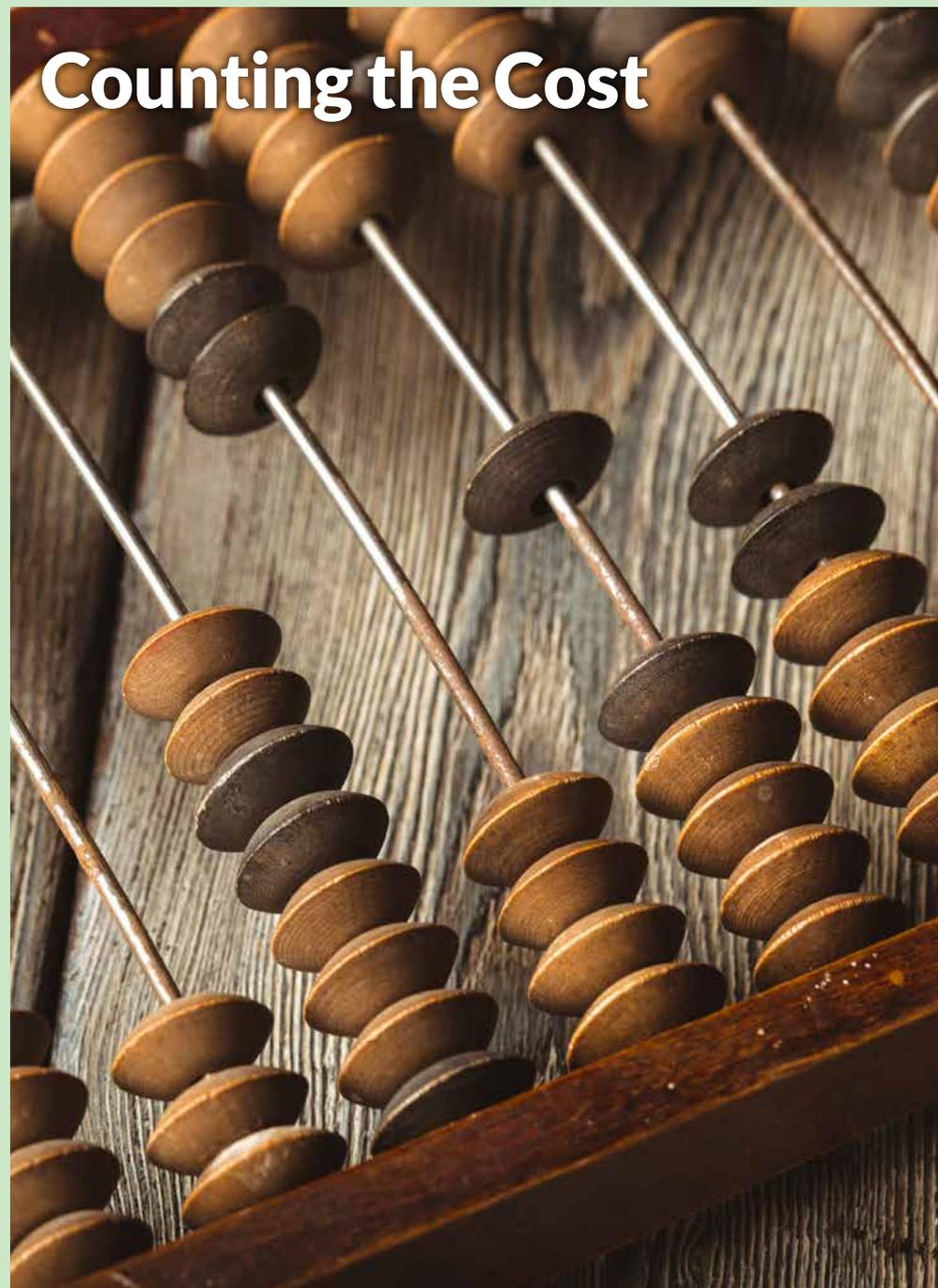
Managing Existing Awards

While funders will consider requests for extra funding, this is being done in the main on a case-by-case basis. Some funders have a maximum grant amount which cannot be increased. They are in some cases, however, allowing no-cost extensions to allow budgets to be utilised. Grant holders are being asked to retain/record evidence of any additional costs incurred, e.g. irrecoverable fees arising from the cancellation of meetings/ events; salary costs for staff supporting frontline NHS services. Even if the costs cannot be recovered there will be a need to assess cost to the grant and the university.

Clinical guidelines

It continues to be essential that clinical guidelines are applied. New risk assessments are being made where, for example, studies involve hospitals, or where Covid-19 might present issues for the safety of the study.

Counting the Cost



David Becker shares insight from his research into the implications of the pandemic on university finance.



David Becker
PRINCIPAL CONSULTANT

Leading Through Adversity

University finance directors (FDs) are the custodians and stewards of their institution's financial strategy. Without exception, they are also crucial components in the strategic leadership machines of their institutions. Our conversations with a cross-section of FDs from all mission groups painted a picture of a community of staff who care deeply about their institution and the higher education sector, who are finely attuned to the concerns of both students and colleagues, and energetic – often provocative – in their thinking about how they should lead through this crisis. And the crisis is real. Depending which analyses you examine, the coronavirus pandemic seems certain to result in a total decline of income across the sector of around £2bn. The immediate concerns span issues relating to tuition fees, regulation, pensions and estates. There hasn't been a shortage of headlines in recent weeks about the implications of that

shortfall on all these aspects of university operations. Whilst the immediate cash flow issues will hit our institutions hard – one FD cited losses approaching £60m from cancellation and refunding of student accommodation fees, conferences and events – it's the likely drop in student recruitment that's exacerbating the pressure that many FDs feel and which is a key cause of their sleepless nights.

Specifically, it is the collapse in the international student market that is the key issue. The financial contribution that flows from international students subsidises research in many institutions. It's a different financial conversation in other institutions that have little or no research to subsidise but needs international (often business school) student income to fund its core infrastructure. Institutions are recognising the need to think strategically about their reliance on this income stream and how much it costs to be in that market.

“It sounds like a dreadful thing to say but this is a big opportunity and it would be a shame if the sector doesn't transform”

FINANCE DIRECTOR AT AUK UNIVERSITY, MAY 2020

“When it comes to the nuts and bolts of operational finance, then the change hasn't been that significant. We may need less space in future, we've discovered more effective ways of doing things. But if we're talking about the implications for university finances rather than the implications for finance teams... well, I don't even know where to start. I expect us to announce initial cuts of £40m within the next month.”

Given the gravity of the situation, it's no surprise that finance directors were at the heart of decision-making about the immediate steps their universities have taken in response to financial concerns. As a rule, they have pressed pause on all uncommitted investment in buildings and infrastructure and have introduced emergency spending controls to ensure approval is only given for spending which is absolutely necessary. After some deliberation, several institutions also moved to furlough staff in areas where they felt comfortable that doing so would be within the rules. One FD pointed to purchases being down by 80% as a result of the majority of staff being off-site, and referenced how 'slamming the breaks on staff recruitment' and taking 'a big chunk off capital expenditure' had led to cash



balances being higher than they otherwise would have been. This did not, however, disguise the longer-term bleakness of scenario planning, nor impact the overwhelming caution that our interviewees felt about the extent to which government support would – or would not – be forthcoming:

“As a sector, we're dependent on government to bail us out but we need to plan on the basis that they won't. The government view is that there are too many universities.”

A large number of FDs had also spent considerable time on the

phone to the bank in recent weeks. Whilst the general sense was that discussions with banks had largely been supportive, and that any covenant breaches would be considered sympathetically, this was not universal. At least one participant described the process as *“more difficult than I first thought it would be”* and another had been required to front their Vice-Chancellor and Chair of the Board of Governors as part of the process. Discussions with the European Investment Bank (EIB) were also more complex, partly because of the short-term implications of the pandemic

but also because of the ongoing Brexit negotiations and how borrowers may be impacted by the outcome. FDs were thinking very carefully about the impact of increased debt and what that might mean for longer-term strategic investment in key initiatives:

"We have an existing debt of around £90m and have reached agreement that we can borrow above that if absolutely necessary but of course that debt has interest attached to it. There's a careful balance we have to strike between surviving in the short-term and investing in our core mission"

The response to government plans emerging throughout April and May was particularly lukewarm in recruiting institutions:

"Our own assessment is that the student number controls won't help us one bit. What's being talked about is that student numbers will be limited to our forecast plus 5%. Well if that's right then stronger institutions will still sweep up students to our detriment. It won't protect us at all"

A Feat of Comedic Timing

The timing of the pandemic was so bad that it was described by one finance director

as 'almost comical' whilst another used altogether more industrial language to express his frustration. Certainly, the picture for several universities wasn't rosy even prior to the outbreak. The perfect storm whipped up by the regulatory and socio-economic environment had already caused many institutions to instigate large-scale cost-cutting programmes. This cost-cutting was achieved most frequently through the ongoing application of voluntary redundancy (VR) and mutually agreed severance (MAS) schemes. This revealed a particular challenge with the timing of the pandemic:

"We've been through several cost containment exercises in the last decade and now there's very little fat left to trim. It's always possible to make further cuts but that needs to come now with an understanding that we're cutting important activities as well as staff. We can't just absorb additional workload anymore...some things will need to stop"

This sentiment is certainly one with which SUMS is familiar and an area where we are already working with a number of our members to provide facilitation of (and objective challenge to) conversations about which

activities are and aren't a strategic imperative. These are discussions which are uncomfortable and emotionally challenging by their very nature. We would emphasise that there is a wellbeing angle associated with any reluctance to tackle these issues. No amount of professional development in the areas of resilience or change can enable a reduced pool of staff to pick up the same volume of activities that they and their colleagues were delivering previously. There is, therefore, both a financial and a human incentive to reconfigure university

priorities. A failure to do this simply risks staff burnout, low morale and financial jeopardy, the classic 'death by a thousand cuts'.

Reasonable Worst-Case Scenarios

"We were in a healthy position prior to the pandemic. Yes, that's changed. We're going to need to save around £70m over two years and that may even be a little optimistic"

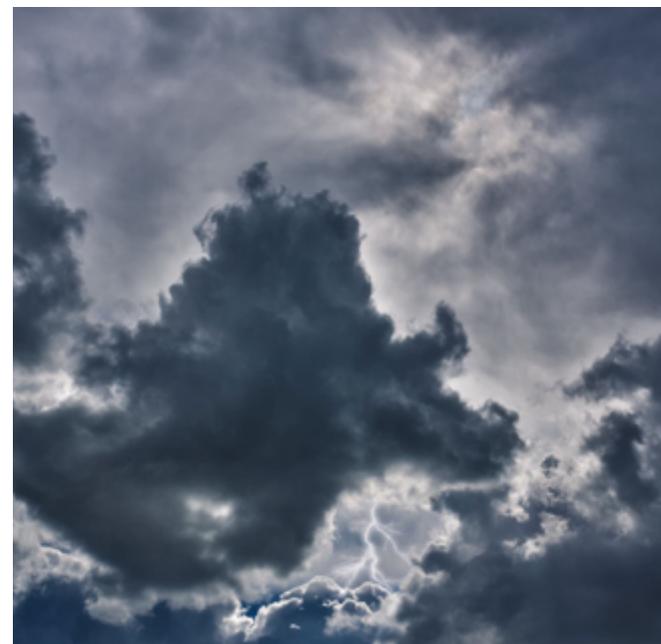
Whilst there was significant variation in the overall scale of anticipated loss of income,

the projected decline in many cases could reasonably be described as 'extreme'. However, participants often felt that it was the uncertainty around the next few years which was making planning particularly difficult rather than the raw numbers themselves which are largely based on slightly subjective scenario modelling. There was a consistent level of concern about the lack of certainty emerging from government guidance, as well as an acknowledgement that scenario planning, whilst crucial, had limitations and had to keep being revisited as optimism and pessimism fluctuated:

"We have to assume that there'll be a big decrease in EU and international student numbers – but we don't quite know by how much – and we have to assume that some UK students will choose to defer entry – but we don't quite know how many. We also have to assume that our research income will drop – but we don't quite know by how much or for how long. So given all the assumptions the only prudent thing to do is work on a reasonable worst case scenario and that means a loss income of over £120m over a three year period"

Every Cloud Has a Silver Lining

Despite the obvious challenges of the pandemic, the finance



directors we spoke to were already weighing up some of the opportunities presented to them by the outbreak. At one level a perceived advantage was simply the 'recognition that financial control which was merely tolerated in the past will now be embraced and even relished!' but the benefits finance directors had in mind spanned multiple areas ranging from leadership culture through to structural reform, process improvement and appetite to tackle long-standing problems with core business:

"I'm delighted about it in some ways. How long have we been trying to exert some control over the proliferation of our academic portfolio? It's been like wading through treacle up to now, but

the financial implications of this coronavirus should speed the process up enormously."

In a similarly positive vein, and despite the projected black hole in future income, the implications that the remote working regime has had on operational finance teams themselves were also felt to have been largely positive:

"We were still more reliant on paper-based systems than we should have been and we all knew it, despite the noise in recent years about digitisation. A lot of our payroll was paper based, most of our online forms were just Word and Excel documents which people printed off. Even the way we were audited by [a big commercial firm] was outdated because they always



wanted to see paper copies of everything. We were still handling cheques and hardly anyone had ever worked from home before but the fact we had no choice but to innovate was what moved us forward. We've modernised more in three weeks than we had in three years"

Several respondents referenced the previous reluctance there had been across their operational teams to adopt remote working arrangements and credited the pandemic with transforming the culture of office presenteeism in a matter of days. One respondent recalled how his teams still believed that neither systems nor people could cope even beyond the first week of lockdown, but

that the experience since then has liberated thinking both within the financial services department and elsewhere in the university. Whilst those sentiments were echoed to a large degree by other respondents, there was also acknowledgement that the speed of innovation had bred slight discomfort in some quarters, as well as occasional difficulties:

"People love to hate us but that's because we have a duty to manage financial processes tightly, to record them for audit purposes and ensure there are safeguards in place for authorisation. Everything has gone ok so far but the swift change means any areas where we were vulnerable might be highlighted more than they would have been

otherwise". Not all of the benefits identified were financial in nature. Several FDs expressed views that underlined their commitment to wider strategic leadership issues and not just financial sustainability:

"I'd like to think that things will change in terms of pedagogy, that this will totally reverse the way that we deliver. That we will get rid of the old model of 500 in a lecture theatre. It's an opportunity to flip the model, stop transmitting and change the rigidity of the structure. Also, we can have more than one intake a year!"

More than one respondent also referenced the emerging effect that the pandemic had had on his leadership team, suggesting that they now realised how much more capable they were than they thought.

Agent Provocateur? The Case for Wholesale Reform

We heard some interesting - and frequently provocative - thoughts from our participants during the course of our conversations. These ranged from a strong belief that government support would damage the speed of change that UK higher education should be pursuing, through to frustration about the numbers of tertiary education providers

that sometimes exist within one geographical region. When asked to unpack these issues further, the respondents pointed to the presence of a 'burning platform' as a prerequisite for successful change - and suggested that any injection of support would simply decrease the appetite in some institutions for the far-reaching transformation that was otherwise within their grasp. In a similar vein, some finance directors questioned whether, in a time of deep financial peril, it was in any way necessary or prudent for providers within the same geographical region to continue operating their own sets of professional service provision. It is fair to say that these views were not, however, universal! An equal number of participants emphasised an absolute need for government support, albeit with conditions attached that would still encourage further modernisation.

Notwithstanding the above, it was clear that there was significant appetite in some quarters to pursue wholesale changes that go well beyond the objectives of previous years' internal change objectives - and that ambition was present to some extent in pockets of all mission groups. With reference to some of the initial

communication emerging from Universities UK (UUK) a finance director at a large modern institution commented that *'I couldn't help but note the little paragraph pointing towards rationalisation and mergers!'*. This subject proved a fertile one for further exploration:

"If you take a look at the rationalisation and mergers of banks and building societies in recent times, when you look at what's happened in FE, when you take into account the sheer volume of calls on the Treasury for financial aid, it must surely be a given this time that institutional failures are coming down the track? It feels unavoidable to me and we have to chart a course which allows us to exploit the situation and not be consumed by it"

In turn, this opened up discussion about what it would mean for a university to 'survive and thrive' in a post-lockdown world. These discussions revealed a slight tension between how possible it was to balance the short-term response to immediate cash flow problems with strategic creativity about how to future proof an institution. It would be over simplistic to suggest that finance directors weren't thinking hard about both these issues but there was often a natural bias towards

one over the other. An example of focus on a longer-term ambition included the statement that:

"Our key objective has to be to gobble up the post-16 education offer across the entire region and create something approaching a monopoly. Financially and reputationally that's fraught with difficulties, but my role is to find ways to support the process. If we can do it then we'll secure a pipeline of degree-level students for future years whilst also making a difference to widening participation and access. If we don't do it we'll simply be taken over ourselves by another institution"

FDs emphasised the need to diversify income so that there was less reliance on Chinese students or the government. So broadening the product base for example by provide on-line courses overseas which was an opportunity for universities with a strong brand. More than one respondent welcomed the increased appetite for flexibility in the delivery of programmes, including multiple start dates and in country delivery. Whilst in the past there has been little appetite for shared services, the topic is now firmly back on the agenda.

Whilst others were very much zoned into the issues of 'here and now', seeing immediate cost control as a necessary hurdle to be leaped over before broader ambitions could be countenanced:

"Survival depends on cutting our cloth. There's a huge gap between what we earn and what we spend. I want all unnecessary costs out of the business - ideally by yesterday. I expect all my colleagues to support that process. If that means they can't have biscuits at their meetings when we get back to campus, then so be it."



A number of FDs recognise the need to engage with Heads of Procurement as business partners, to come together on the challenge of managing third party spend and to explore fully what Procurement can deliver. Much efficiencies work focuses upon

staff costs, but addressable spend for medium size universities, on average, is over 45% of total spend. Before moving to cut pay budgets, university executives want to ensure they have explored all options to reduce unnecessary costs. This is a time



that offers opportunities to reimagine services.

While FDs emphasised the need to diversify income, some also recognised the need for innovation to help them ensure that when the upturn in demand comes, they will be able to respond and deliver. Universities will need to ensure that they can access the expertise and assets they will need.

What Happens Next?

When thinking about how Covid-19 might change their approach, finance directors speculated on issues spanning operational finance through to adaptive leadership, structures, culture and processes:

"We need to revisit what Finance does." "We need a better understanding of our costs, cross subsidies and the areas that need investment. We need to be more data driven." Another commented that "a review of staffing structures is unavoidable. We have an overdependence on fixed-term contracts and it would be preferable to have fewer, better contracts. At the moment we have fixed-term teaching only or fixed-term research only. Universities moved away from the classic 'lecturer who did everything', maybe we need to move back to that. This

will involve working at pace and it's whether our HR colleagues are able to cope with the shift"

We asked all our interviewees to reflect on their experience during Covid-19 and to comment on their top three critical success factors for universities in dealing with unprecedented change. The most common factors were:

1. Be clear that for any financial difficulties and complexities, it's still delivery of a high quality and consistent student experience that we need to place at the heart of decision-making. When universities lose sight of that they risk making decisions that may seem sound from a corporate risk perspective but which actually damage the very fabric that previous success is made of.
2. Be authentic in communications, clear in language and honest at all costs. It's ok to admit you don't know everything, and the more unpalatable the message the more it needs to be expressed without spin. Be data driven and be transparent.
3. All those in senior leadership positions need to act with collective responsibility instead of seeing it as their role to represent their department's concerns to

the university. Now is not the time for well-paid managers to resist the fundamental change ahead. Similarly, now is not the time for long, drawn-out consultative processes and institutions should seek to co-create the solutions, at pace and without excessive bureaucracy.

FDs hold a unique position in the organisation. They are responsible for providing a commercial perspective and managing the business risks of the university. They emphasised the importance of the role in explaining the current financial situation and the plans to mitigate it to external organisations, Council, Senate and staff. One FD remarked that perceptions of the role have shifted dramatically and many staff now appreciated that FDs are not a "necessary evil", but instead a critical role that supported the values and purpose of the institution. Although troublesome times lie ahead, our conversations left us in no doubt that finance directors stand ready to play active and visible roles in helping their institutions transition to an operating model that will be fundamentally different to any that have gone before.





Why Work With Us?

Our unique membership model offers great value-for-money. SUMS members benefit from:

- > Member-specific consultancy assignments, tailored to individual institutions' needs
- > Participation in collaborative assignments that tackle topical issues and provide insight for the sector on trends and activities
- > Support from our expert staff, who have extensive experience and knowledge of the HE sector
- > Access to our accumulated experience and knowledge of higher education institutions and developments over 30 years
- > Access to our member base of universities across the UK, representing the breadth of UK mission groups, for networking and knowledge sharing
- > Free member events including an annual conference, seminars and workshops to learn about the latest insights from SUMS' membership and beyond
- > Community of Practice Groups to discuss discipline-specific issues in a collaborative and supportive environment with like-minded colleagues
- > Professional development support to help senior leaders operate at peak performance within new or evolving roles

- > Knowledge exchange through a series of free publications including briefing papers, best practice guides and case studies
- > Flexible membership options and preferential consultancy rates for any work completed once an institution has used its full complement of membership days.

Working with SUMS feels like a genuine partnership. It's been very refreshing and has helped challenge our thinking.

**REBECCA TRENGOVE,
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