



# Creating the University of the Future: SUMS Consulting Annual Review

June 2022



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# The Challenges Facing Ambitious Universities

Universities are coming face-to-face with both existential and practical challenges that will impact their ability to deliver high quality education in the years ahead. Whether it is financial, political, social or cultural, the pressures facing the Higher Education sector in the UK are slowly but surely separating the successful institutions from those who cannot meet the needs of an evolving society.

Over the last year, we have seen continued real-terms decreases in university funding; increased pressure on student services – particularly in wellbeing and mental health; culture wars on campus; trade-offs between access and standards; and a building ambition to achieve net zero carbon emissions.

The ambitious and successful university of the future needs a dedicated partner that is aligned with its values to help address these challenges with authenticity and impact. SUMS is that partner.

As you will see below and throughout this year's Annual Review, we have been working in partnership with institutions across the UK – and internationally. Whether it is exploring your target operating model to ensure your university is financially fit for the future, assessing your ways of working to help you meet the increasing needs of students and staff, or helping you take practical steps to achieve Carbon Net Zero, we are here for you.

Contact us for objective insight from experts that know what is important to you.



# SUMS Consulting: Your Specialist HE Partner

We are a not-for-profit specialist higher education consultancy fuelled by a team of experts, drawn from within and outside the HE sector, who are passionate about supporting universities. In addition to HE-specific insight, we bring innovation and world-leading good practice from other sectors to our work.

As part of the SUMS Group, our collective reach extends beyond 50% of the UK Higher Education sector. As a membership organisation dedicated to sharing best practice to benefit the sector, our members include a wide range of teaching focused institutions as well as some of the most renowned research-intensive universities in the world.

We understand universities and work across all areas of

professional support, strategy and change. Our in-depth knowledge of universities sets us apart from other consultancies. We know how to engage positively with academic areas and bring together their needs with those of professional services. We understand how all areas of a university must work together and be strategically aligned if the institution is to deliver on its strategic goals and enhance the student experience and research.

We have helped our university members and clients to solve complex problems for the past 60 years.

## Areas of Expertise for the HE Sector

- > Efficiencies, transformation & change, including procurement services
- > Ways of Working

- > Digital transformation
- > Marketing and student recruitment
- > Learning and Teaching
- > Student services and the student journey
- > Wellbeing and mental health services
- > Research and enterprise
- > Space management and timetabling
- > Coaching and professional development
- > Professional service functions including Finance and HR.

*[This is] my third institution where I have called on your assistance – SUMS never fails me!*

**DEBORAH GREEN**  
CEO, UCISA



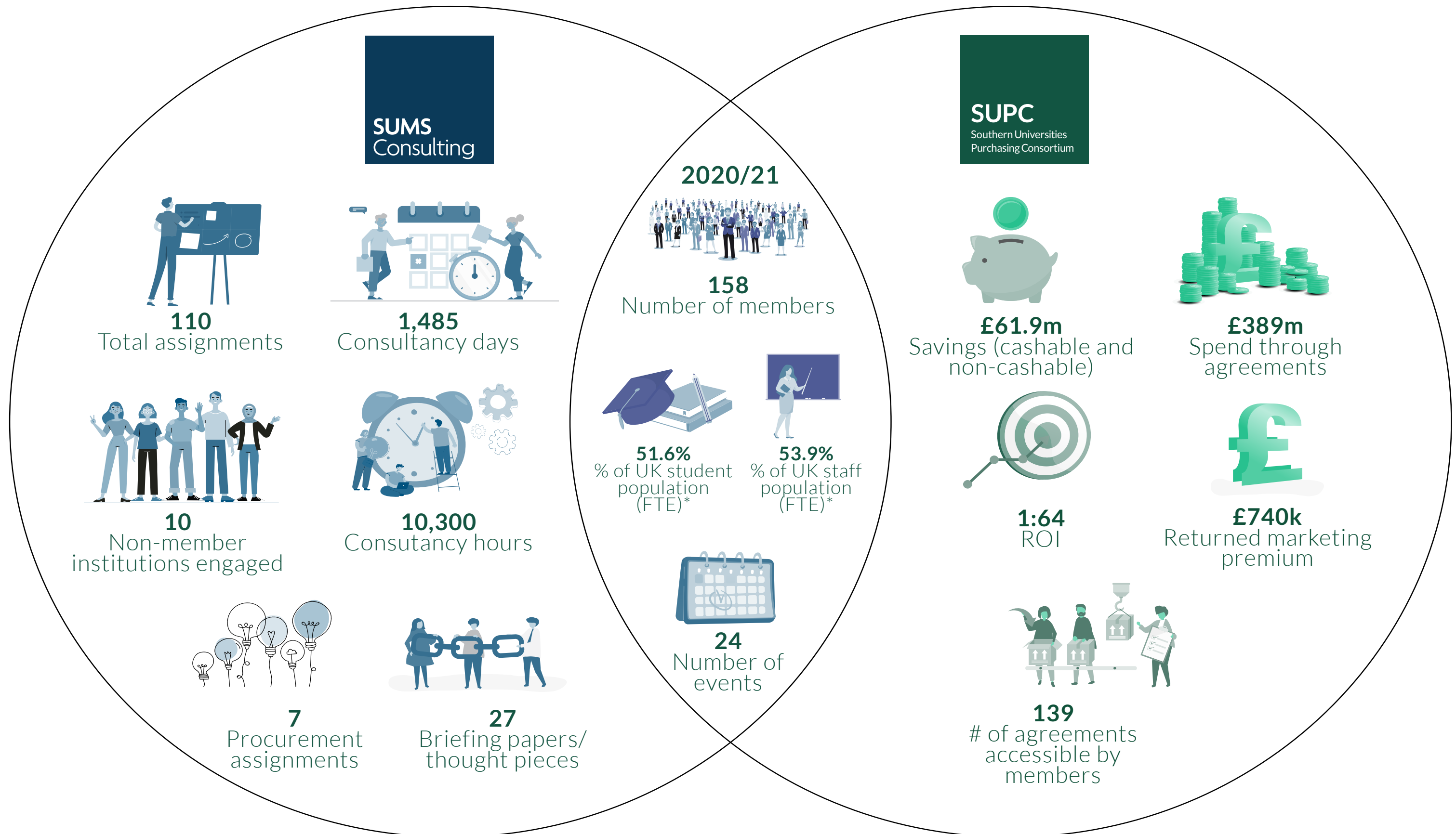


# Our Members



# Our Clients





\*HESA data 2019/20

# Why Become a Member?

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
- > 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.





# Your Team

We also work with a network of carefully selected Associate Consultants, so that we can draw on specialist expertise that is relevant for each specific assignment. You can trust that we choose only to work with associates who understand the HE sector and the challenges and opportunities you face.



**Bernarde Hyde**  
CEO, SUMS GROUP



**Joel Arber**  
GROUP MANAGING  
DIRECTOR



**David Becker**  
MANAGING  
CONSULTANT



**Claire Taylor MBE**  
MANAGING  
CONSULTANT



**Helen Baird**  
PRINCIPAL  
CONSULTANT



**Fola Ikpehai**  
PRINCIPAL  
CONSULTANT



**Jeannette Strachan**  
PRINCIPAL  
CONSULTANT



**Ruth Buckingham**  
CONSULTANT



**Emma Ogden**  
CONSULTANT



**Tom Owen-Smith**  
CONSULTANT



# Strategic Efficiencies and Target Operating Model



The operating environment for universities is more complex than ever. To remain competitive and deliver on their ambitions, institutions must ensure that their strategy, service delivery, processes and people capabilities are as efficient and fit-for-purpose as possible. Universities have approached SUMS to help them:

- > Review their professional services target operating models
- > Benchmark their financial models and delivery on investment
- > Help lead transformational change programmes.

SUMS consultants bring insights from their experience of designing and implementing Target Operating Models and transformational change programmes across both HE and other sectors.

The SUMS Group includes SUPC, the largest of the HE regional

purchasing consortia in the UK, so we also introduce specialist procurement expertise and insight to support our members and clients.

## Financial Efficiencies

Financial sustainability requires leaders to focus on efficient use of resources and appropriate return on investment. SUMS has supported members to carry out full economic costings of Schools and functions and to benchmark within their own institution and against other organisations, within and beyond the HE sector. We extend this analysis by facilitating conversations to identify root causes of inefficiencies and to deepen an understanding of full impact.

SUMS’ extensive work in procurement suggests that every university has the potential to make savings of at least 5% of its impactable spend through improved

procurement. At times of cost constraint, a commitment to address non-pay savings is politically important.

## Assignments Include:

### Review of Scholarships Offer – University of Nottingham

- > SUMS consultants partnered with the University to benchmark the impact of their scholarship funding. The review included comparing their model with the models of institutions with known impact measures; interviews and quantitative analysis that invited the whole university

community to contribute; facilitated conversations to draw out problems; and context-appropriate solutions. This helped the University to assess its competitiveness and impact and, ultimately, save money.

### Procurement Enhancement Programme – Aberystwyth University

- > SUMS have been working with the Procurement and Planning teams and key stakeholders to identify and introduce new ways of working and deliver benefits through enhanced procurement

*“...SUMS’ knowledge of the sector meant we wasted no time briefing them on potential pitfalls and they immediately struck up productive relationships across our senior management cohort...We’re now taking our operating model forward as part of a broad package of measures to help us thrive in the years ahead.”*

**RUSS LANGLEY**  
CHIEF PERFORMANCE OFFICER, UNIVERSITY OF DERBY



and contract management. This has included developing a business case, programme plan and Procurement Strategy and we are now supporting the programme team in piloting a new approach to procurement through a series of procurement category initiatives. Our work with the university has already resulted in increased capabilities in strategic planning, change management, data analysis and category management and it is the expectation that the programme will deliver additional benefits including financial and sustainability benefits aligned with the university’s strategic objectives.

Value for Money Assessment – Multiple Universities

- > SUMS has supported several



Learn more about our procurement consultancy support here!

universities to drive savings in their non-pay expenditure – a much preferred and complementary option to addressing staff costs. We have combined SUPC’s in-depth expertise in university procurement with SUMS Consulting’s efficiency and effectiveness know-how. Our Procurement Value Assessment (PVA) blends an unparalleled understanding of university procurement best practice with detailed qualitative and quantitative analysis of your university’s non-pay spend to create unique insights.

Target Operating Models (TOMs)

We recognise that transformational change can be hard to deliver while running your institution, so our consultants are there to work with you while you balance both needs. Having developed their long-term strategic plans institutions and are turning their attention to the TOMs

they need to help deliver them.

The SUMS approach to TOM design and implementation:

- > Encourages collaboration and empowerment across university communities, reducing organisational boundaries and silos that impede fast, strategic decision-making.
- > Is applicable at the macro-level – looking at the full breadth of a university’s professional services – and works equally when we are drilling down into a specific service area like IT or Finance.
- > Co-ordinates change capabilities for a more effective transformational journey.
- > Considers both current and future learner expectations, innovative digital technologies and consequent changes to job roles.
- > Is flexible to changes in the external world that impact on institutions’ strategy and approach.

Assignments Include:

TOM Design– Multiple Universities

- > The likes of Cardiff University, University of Wolverhampton, Liverpool School of Tropical Medicine have partnered with SUMS to identify and implement the appropriate models to deliver their long-term visions. Working within and across services, we supported these universities to develop the most context-relevant option, engaging and empowering their whole community.

What We Do

- > Partner with you to build evidence of your current situation and challenges
- > Provide suggestions for a Target Operating Model that will work effectively in your context
- > Act as a critical friend to challenge your assumptions and build robust, appropriate solutions

### Transformation & Change

Institutions must ensure that the changes they make are sustainable for future generations of learners and staff. We work with our clients to ensure that they recognise that transformation and change is a journey. In a fast-moving world, they must be flexible and responsive to be future-proof.

We can help your university with:

- > Leadership buy-in and understanding of both the change and their role within it
- > Changing expectations of roles and behaviours, at all levels of the institution
- > Skills and knowledge transfer from SUMS consultants to in-house teams to build internal change capabilities.

We have invested significantly in our business insight and data team, and they have developed data products to underpin our practice. These include online visual dashboards, so that clients can explore and analyse their own data themselves.

SUMS is able to provide insight into relevant innovation and best practice beyond the HE sector. We help our clients look at complex non-commercial organisations such as the NHS and government departments. Where appropriate, we have partnered with organisations such as Gatenby Sanderson, who specialise in executive development support for leaders.

#### > Strategic Business Case for Student Information System – Durham University

SUMS consultants were asked to undertake assurance for the University's Creating an Integrated Student Experience Programme. As part of this, SUMS undertook research with universities that had recently embarked on major Student Information Systems implementations to identify lessons learned and best practice to support a successful implementation at Durham.





- > **UK Registration Advice – SP Jain School of Global Management** SUMS supported global business school SP Jain on a number of assignments to help them extend their reach within the UK. This includes supporting them in their application for registration with the Office for Students and the Quality and Standards Review, as well as supporting project planning for establishing a London based campus.
- > **Organisational Strategy Development and Review – UCISA** This member-led professional body wanted to develop a more ambitious organisational strategy that really pushed them to make a difference in their field. They asked SUMS consultants to facilitate visionary discussions, act as a critical friend to challenge their thinking and develop a strategy framework. They have since requested that we return to review the effectiveness of implementation.



Remaining relevant, competitive and sustainable will be dictated by how quickly and effectively an institution responds to changes in the landscape.

**Software as a Service Migration for Student Information Systems**  
Universities need to make strategic decisions about their future student information requirements. Starting this process soon will allow sufficient time for any necessary procurement activity, implementation and change programmes. Across the SUMS Group we have the expertise to assist with the strategic considerations and the procurement activity.

**User Journey**  
New generations of learners and staff will experience the world in different ways and will come to HE with different expectations. Institutions need to think about what this could mean for how they function – at both the strategic and operational levels. SUMS is well-placed to support wide-

ranging, transparent conversation, review and shared learning.

**AI and Machine Learning**  
These innovative technologies are already a significant area of consideration for some universities - they bring the potential for real competitive advantage for those who get it right. This will apply across areas from learning and teaching to professional services. By strategically applying the use of technology, forward-thinking institutions can review how people’s time can be used to add value in a competitive market. Through our partnerships with organisations like Adobe, and our work with universities across the UK, SUMS can support wide-ranging, transparent conversation, review and shared learning.

**Whole-University Community**  
Universities are complex and interlinked systems, but these



different parts of an institution often work in ways that are not truly aligned. With the need for sustained transformational change, a commitment to a shared vision that recognises local structures will be key to success. SUMS consultants have a breadth of experience in different institutional structures and ways to come together while valuing difference.

# Case Study: Designing the Right Target Operating Model for Your University

## Who We Worked With

A mid-sized modern university in the midlands

## The Situation

In order to deliver on its commitment to excellence for students, staff and their region, the University had developed a 2025 Strategy. In 2020 they looked for support with an ambitious transformation programme that would help deliver this strategy. The two key components of the programme were data-informed insight, followed by the development of an operating model design which included in-scope all areas of professional services.

## What Happened

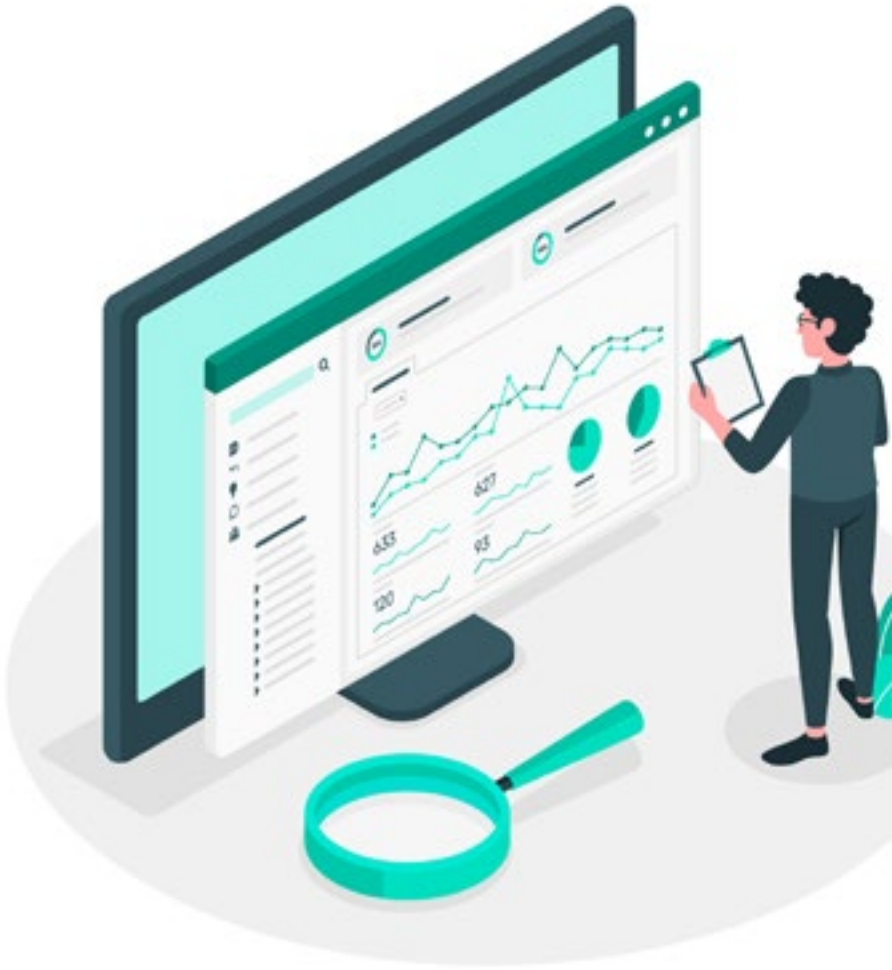
The SUMS consultants collaborated with key stakeholders across the university. They co-created a vision, strategy and design principles

in support of a future-proofed operating model for professional services. This was informed by diagnostic work which included:

- > quantitative statistical data analysis of the University’s performance in comparison with a group of benchmark institutions, broken down to a function-by-function level and visualised through interactive Tableau dashboards
- > in-depth interviews with the Executive Board and professional services directors
- > widespread engagement with university staff
- > best practice principles from other universities (both UK and overseas), the commercial sector, and insight from other SUMS assignments

In developing the Target Operating Model (TOM), the team considered the university’s existing

services and customers, its systems and technology landscape, its channels of delivery and the cost benefit of provision. The TOM identified, captured and defined all existing capabilities in professional services and also identified those that would need to stop or change, or which required further investment, in order to translate strategic ambitions into on-the-ground reality.



*“The SUMS team was energetic, professional and insightful from the onset of the engagement. Their knowledge of the sector meant we wasted no time briefing them on potential pitfalls and they immediately struck up productive relationships across our senior management cohort. They were keen to inject challenge but responsive to our own requests. We’re now taking our operating model forward as part of a broad package of measures to help us thrive in the years ahead.”*

**CHIEF PERFORMANCE OFFICER**  
UNIVERSITY EXECUTIVE BOARD



The consultants delivered a visual representation of how a high performing professional services could function at the university in the future, in addition to a transition plan which, upon implementation, would lead the institution from its current position to its desired future state.

**The Difference It Made**

SUMS identified and evidenced the potential for multi-million pound cash savings, reduced layers of management hierarchy, improved decision-making (especially through investments in data quality and automation) and more agile organisational structures that sit under appropriate professional leadership. The model identifies all current and future capabilities that need to be present within a modern and flexible professional services base which can meet the demands of the rapidly changing UK HE landscape. The University is taking the proposals forward as part of its broader package of business improvement initiatives.



# Case Study: Supporting University Consolidation Processes

## Who We Worked With

Three universities - Gdańsk University of Technology, University of Gdańsk and Medical University of Gdańsk – who are planning to consolidate under the title of Fahrenheit University.

## The Situation

The universities were planning to consolidate, with the objectives of co-location, enhanced research impact and increased international visibility. They had already identified expert indicators of visibility, including collaboration output, awards volume and research pertaining to the UN’s Sustainable Development Goals. Their next step was to explore strategic options for change that added value and efficiency to their current operating model. They looked for a partner who understood the critical success factors associated with mergers in a higher education context.

## What Happened

Drawing on our knowledge of international Higher Education, SUMS consultants developed and facilitated a series of workshops with key stakeholders, including the rectors of the three institutions, senior academic leaders and professional services leaders. These sessions focussed on:

- > Exploring merger case studies
- > Planning for possible merger scenarios
- > Synergies that could be achieved in relation to the expert indicators that the universities had already identified.

These sessions enabled individuals to have their views heard and supported the ongoing process of engagement and buy-in to change.

Following on from the discussions at these workshops, the consultants produced a high-quality roadmap for change covering:

- > An appraisal of options for

- strategic collaboration
- > Proposed implementation actions
- > Predicted impact
- > Potential risks and mitigation

## The Difference It Made

The SUMS consultants were able to operate within this politically complex environment and work sensitively with multiple independent stakeholders. They understood that leaders would not want to take their organisations through significant, painful change, without an objective evidence-base underpinning it. The roadmap provided the leaders of the three universities with impartial evidence to move forward, based on widespread consultation and engagement.



*“We knew that there was potential for significant positive impact on our institutions and our region but we also understood that consolidation is a sensitive subject. Working with a partner like SUMS meant that we could be confident in their expertise to engage appropriately with our leaders and their previous experience of merger activity and learning.”*



**PATRYK ŻYŁA**

ORGANISATIONAL COORDINATOR, SUPPORTING UNIVERSITY CONSOLIDATION PROCESSES PROJECT, GDAŃSK UNIVERSITY OF TECHNOLOGY



# Ways of Working

As institutions grappled with the early challenges of ways of working, SUMS Consulting partnered with a number of universities to co-create the principles they used to set ways of working for a post-pandemic world. We are now seeing a move to a longer-term assessment of how HE communities will return to 'normal'. These new plans are not simply reactive to circumstances; they are driven by a deeper strategic approach to the future.

SUMS consultants are supporting our members and clients to develop innovative and pragmatic solutions. Universities are talking to SUMS about:

- > Space management – how do we make our physical estate work better for us now and in the future?
- > Digital infrastructure – how do we support a more dispersed staff and student base with the

technology they need to achieve excellent outcomes in their role?

- > Culture change – how do we connect, lead and manage a dispersed community to deliver shared goals and maintain a continued sense of institutional identity?

## Strategic Mindset

Many university leaders do not want a return to pre-pandemic days, with many of the challenges they are facing now already apparent before 2020. The role of the leadership team and managers in leading change is central to success. These groups must develop the skills to lead at the same time as successfully navigating the impact of change themselves.

Universities have worked with SUMS to challenge their thinking about how work is carried out. We help universities look at



institutional and individual attitudes to risk and trust. Sharing inspiration from within and beyond the HE sector, we work with universities to find the intersection between best practice and their institution’s strategic priorities.

Implementation Challenges

Once universities have a clear strategy for future ways of working, they must address the operational challenges of a hybrid workforce. SUMS is working with members to define and address a number of areas, including:

- > Infrastructure challenges and embracing technology. Institutions have the opportunity to exploit the digital revolution, making use of increased automation, AI and digital self-service. But they need to understand what that means for them and address the technology requirements and skills



We have seen an increase in institutions addressing their ways of working and we believe this focus will continue, with a demand for greater attention on developing approaches that are appropriate for specific university cultures.

Digital Integration

A greater reliance on technology is pushing institutions to focus more on an integrated ecosystem rather than relying on independent best-of-breed solutions. This means universities must have an in-depth understanding of their students’ and staff’s needs and a comprehensive awareness of the current marketplace. With our expertise in strategy development and our procurement division’s leadership within HE ICT, SUMS is best positioned to get you where you need to be.

Space Innovation

Innovative approaches to learning, teaching and research, as well as new methods for professional services

delivery, will lead to new requirements for more flexible physical spaces and the potential to use estates to generate additional income. As well as SUMS consultants’ expertise in facilitating innovative discussions, the SUMS Group includes expertise from estates procurement specialists.

Behaviours and Behaviour Frameworks

As institutions develop clarity on the way that work is delivered across schools and functions, they will need to clarify consistent expectations for their people. SUMS is well-placed to support them in identifying what they need, how they will implement the frameworks they develop and how they will sustain change so that it is embedded in their culture.

Workforce Planning and Developing Internal Talent

Universities increasingly recognise that developing a business strategy is not enough; they need to assess the people and talent implications of that strategy. Workforce planning needs to become an integrated feature of an institutional planning cycle. At SUMS we have a workforce planning toolkit for members – contact our HR Specialist, Consultant [Emma Ogden](#) for more information.



shortages they may face as a result.

- > Evolution of policies and governance related to how people work. New methods of working require innovative approaches to ensure relevance and consistency. For example, travel policies that focus on transport to campus but do not talk about sustainable business travel may no longer be fit-for-purpose.
- > Staff engagement. It is critical to ensure staff are involved in open and transparent conversations to co-create what the new ways of working look and feel like. This will help to embed new approaches so that they are universally adopted and truly transformational.

Introducing new ways of working also offers the opportunity for conversations

about the skills and behaviours required to operate in a more collaborative, flexible way. It benefits everyone involved to set out clear expectations, of the employees and of the institution. For some universities this represents a significant culture shift to one built on mutual trust and measured on outputs rather than inputs.

#### Assignments Include:

- > **Ways of Working Support – King's College London**  
SUMS supported the University's work on the return to campus for professional services staff through the provision of HE Sector Benchmarking. We provided an overview of trends across the sector exploring areas such as management structures; operating models; service

delivery post Covid-19; infrastructure and agile working; and health, wellbeing and staff enablement.

#### > **Ways of Working to Support Strategic Transformation – University of Reading**

The University was looking for support to deliver the Ways of Working strand of the post-Covid-19 strategic transformation programme. SUMS co-created and co-facilitated a series of workshops with staff and students from across the University. Our subject matter experts shared views on best practice and the 'art of the possible' to stimulate thinking and discussion. Through this, we

helped the University deliver a set of design principles, a gap analysis, solutions framework and high-level implementation roadmap.



# Case Study: Re-Imagining Ways of Working

**Who We Worked With**  
University of Leeds

**The Situation**  
As the Covid-19 pandemic restrictions were relaxed in 2020/21, the University had initiated a tactical return to campus. However, they wanted to adopt a more strategic approach to their ways of working that would support them to achieve their longer-term University vision. An internal Future Ways

of Working Steering Group was tasked with overseeing a change programme that reviewed lessons to be learned from working patterns during the pandemic and implemented a best practice approach for the future.

**What Happened**  
The Steering Group asked SUMS consultants to work with them to test assumptions, explore options and develop a focussed set of principles for post-pandemic ways of working.

The consultants partnered with workstream leads to develop baseline reports showing the current approach and to explore the way forward across a range of functions. SUMS also provided an in-depth report on the Human Resources implications of different models, based on our knowledge



*“SUMS gave the university the foundation that we needed to challenge ourselves and define post-pandemic ways of working appropriate to the University of Leeds.”*

**STEWART ROSS,**  
DEPUTY CHIEF OPERATING OFFICER,  
UNIVERSITY OF LEEDS





of best practice from within and beyond the HE sector.

Once potential options had been identified, we facilitated workshops with pilot teams to understand local needs and the ways in which principles were applied. Overall, our team was able to act as a critical friend in identifying and defining the most appropriate ways of working for the institutional culture at Leeds.

### The Difference It Made

The Steering Group used the outputs from the SUMS consultants' work to re-position internal thinking on the hybrid working elements of post-pandemic ways of working. They were able to define the intersection between best practice and their institution's strategic intent, developing a clear set of proposals for sign-off. They are now moving forward with implementing this new approach across the University community.



# The Sustainable University

Sustainability has wide-reaching implications for the HE sector. All areas of university life has the potential to deliver a sustainable benefit: to the institution, to their local communities and to the wider world.

Our members are increasingly asking us for support to make the best use of their resources and ensure their financial and environmental sustainability. These two concepts are intrinsically linked, although tensions can exist between the two and institutions must therefore actively manage the balance.

## Environmental Sustainability

This is a new but growing area for SUMS Consulting, and we recognise how important it is to our members and to the HE sector as a whole.

Most universities have committed to moving to Net Zero Carbon Emissions. In many cases, they have already made significant progress in addressing their Scope 1 and 2 emissions (direct emissions) by focussing on reductions across their

*"Students and staff expect to see their universities and colleges tackling the challenges and embracing the opportunities now before us. This partnership will provide the guidance and support institutions urgently need. EAUC is delighted to be partnering with SUMS to bring the sector's expertise on sustainability to the forefront and help institutions take strategic and practical action and leadership in the climate crisis."*

**IAIN PATTON**  
CEO, EAUC



campus footprint and fuel consumption. The next challenge is to address indirect emissions (scope 3), the vast majority of which come from their procurement supply chain and business travel.

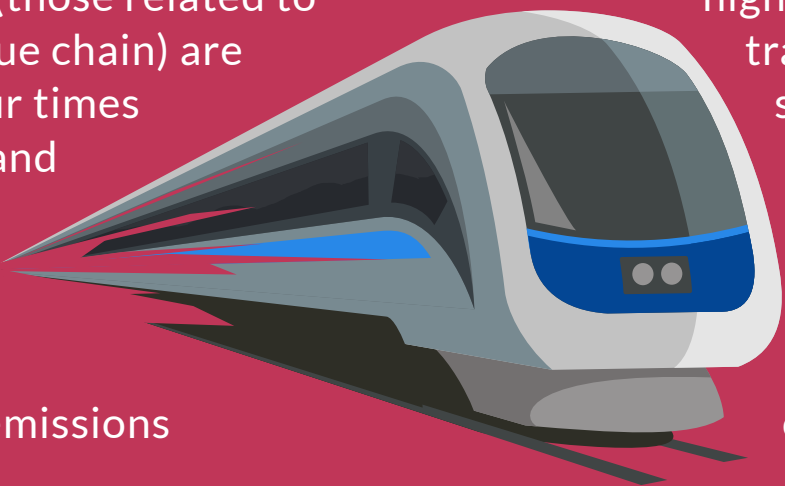
Across the SUMS Group we have a joined-up approach to support for our members in this area. The Group includes the largest of the UK HE regional purchasing consortia, so we can provide specialist procurement expertise. We provide Scope 3 Reports, and insight where required. We also combine our consulting expertise with specialist subject matter knowledge through a strategic partnership with EAUC, the alliance for sustainability leadership in education.



The last two decades have seen sustainability move from a “nice to have” to being firmly on the agenda for the UK’s universities, reflecting shifting positions in the economy, politics and society. Sustainability has been described as an archetypal wicked problem – complex, ill-structured, and touching nearly every aspect of universities’ business and operations. It is also the very reason universities are here – to find solutions to the world’s most pressing issues. It represents both a cross-cutting challenge and an opportunity for universities.

**Reducing Carbon Emissions through More Effective Procurement**

“Scope 3” emissions (those related to an organisation’s value chain) are typically three or four times the size of Scopes 1 and 2 (emissions related to powering on-site operations). Methods for calculating Scope 3 emissions



are still crude and imprecise - so marshalling Scope 3 data to support decision-making is still a challenging area. With SUPC’s procurement expertise and partnership with the EAUC, there is a substantial opportunity for universities to better understand supply chain emissions and start to shape the means of reducing them, working with suppliers and exerting impacts on the wider economy.

**Implementing Sustainable Business Travel**

Business travel is technically classed under Scope 3 emissions; however, it differs from much of Scope 3 as it is relatively measurable and controllable. Some universities have already

highlighted business travel as an area of strong potential for reducing their emissions. However, cultural and behavioural challenges will

need to be addressed to achieve reductions in business travel, as it has long been considered an essential part of an academic career – have a read of our case study below to learn more!

**Carbon Budgeting and Offsetting (Achieving Net Zero)**

It is essentially impossible for universities to achieve absolute zero carbon emissions with currently available technologies. Effective governance, including approaches such as carbon pricing and full-lifecycle accounting will be important in building sustainable organisations. Although it should only be a last resort, some offsetting is likely unavoidable if a university aspires to be net zero in the near future. Universities will need to get a hold on the substantial variability in the quality and cost of offsets to inform decision-making around whether and how to offset carbon emissions. With our substantial expertise in supporting university leaders to take decisions, SUMS is well positioned to help.

# Case Study: Cutting Travel Carbon Emissions for a Sustainability-Focused University

**Who We Worked With**  
University of Reading

**The Situation**  
With a world-leading reputation for climate research, the University of Reading has long championed environmental sustainability. It named sustainability as one of the four pillars of its new corporate strategy in 2019, and aims to be a recognised leader in global environmental sustainability and to achieve net zero carbon emissions by 2030.

These are bold ambitions, and the University recognised that in order to achieve them, a step change would be required in how the organisation operates. Travel, including business travel and commuting, represented an area the University could target to make significant improvements. The University asked SUMS to help develop a set of principles on which it could build a new Travel Policy as the first step to delivering meaningful change.

**What Happened**  
SUMS engaged a wide range of stakeholders from across the University in a series of workshops to explore the challenges and opportunities of travel in the post-pandemic world. While University leaders and the wider community are understandably prioritising environmental sustainability as a strategic imperative, they acknowledge this has to be balanced against the realities of running a multi-site, international organisation with separate campuses across Reading, as well as overseas locations in South Africa and Malaysia.

international responsibilities joined in discussions with Students’ Union representatives and HR staff for a series of rich discussions. Care was taken to ensure that a wide range of staff and student lived experiences were represented in the session.

SUMS also undertook a benchmarking exercise with other research intensive, internationally focused institutions and looked at broader good practice – both within and beyond the HE sector – to help inform the discussions. The stakeholder discussions were used to shape a ‘straw person’ principles framework for consideration and refinement by a Working Group of relevant senior managers – also facilitated by SUMS. A revised draft was then tested with the wider stakeholder group before a final set of principles was agreed.



*“While we’ve made great progress towards our net zero ambitions, both commuting and business travel remains a knotty problem. SUMS helped us find a route through the tangles. Our consultant’s apparently effortless ability to steer us away from the ‘whatifery’ and towards the development of clear ambitions ensured we got to the right destination.”*

**PROFESSOR MARK FELLOWS**  
PRO-VICE-CHANCELLOR (ACADEMIC PLANNING AND RESOURCES),  
UNIVERSITY OF READING



### The Outcome

Demonstrating some examples of excellent practice already, Reading had a comprehensive understanding of the carbon generated by its travel – and at a granular level. While this project covered the full breadth of the University's travel, the stark reality of the impact of flights on the carbon goal made it the priority issue to be addressed – 90% of the travel carbon emissions were generated by flying. In order to deliver against both carbon- and cost-reduction objectives, it became clear that the University needed to significantly scale back its business travel.

The benchmarking helped identify quick wins, including the need for the University to adopt a Business Travel Hierarchy approach – something increasingly seen across the sector. If travel is necessary, the hierarchy helps travellers to choose more carbon efficient modes.

Recognising the importance of its commitments to net zero carbon, stakeholders across the University chose to be bold in their approach, designing a principle that staff and students should avoid flying to mainland UK and mainland European destinations if travel could be undertaken by train within a 12-hour journey time.

While the fruits of this important work will not be evident for some years to come as the University works towards its reduced carbon targets, the stakeholder group agreed to act as carbon champions across the organisation, using their influence to encourage compliance. In this way, business change can be driven by community action far more effectively than by policy diktat.

The University's carbon reduction targets may be ambitious, but it's not just the University's leadership that are determined to achieve them.



# Social Justice

The current generation of students are passionate about social justice issues such as race, gender, equality and identity. They are a highly politicised, actively campaigning generation who, rightly, demand high standards of their educators and institutions. It is likely that future cohorts of students will continue to follow this path. These issues are also increasingly important factors in staff attitudes to their institution.

It is incredibly important that universities not only have high-quality systems and policies in place, but that they actively put them into practice and uphold appropriate standards of behaviour.

## Campus Culture and Behaviours

All students have the right to study and live in a safe environment. Staff must also have the safety and protection of their employer. Disturbingly – and despite the extensive work undertaken across

the sector in recent years – some universities continue to be blighted by damaging campus cultures. Addressing toxic behaviour must be a priority for institutions.

At SUMS Consulting, we are seeing increasing numbers of universities looking to review their culture, systems and policies in order to improve their practice and experience. This covers areas including:

- > Harassment and sexual misconduct



*“We are seeing a move from guidance to statutory requirement in a number of social justice areas. We have invaluable experience of working with institutions to review their practice against the guidance and to develop strategic approaches and principles that will meet both the letter and the spirit of these developments.”*

**JOEL ARBER**  
GROUP MANAGING DIRECTOR, SUMS





- > Intersectionality of diversity with incidents of harassment and hate crime
- > Impact on student and staff mental-health and wellbeing
- > Levels of internal expertise to respond appropriately and provide trusted support

This last area is leading to more examples of partnership working between universities and local experts such as victim support charities.

**Assignments Include:**

**Evaluation of the Statement of Expectations – Office for Students**

In January 2020 the OfS published

a statement of expectations for preventing and addressing harassment and sexual misconduct affecting students in HE. It sets out clear guidance to help providers develop and implement effective systems, policies and processes to protect students. In 2022, the OfS appointed SUMS Consulting to carry out a large-scale evaluation of the statement’s effectiveness and establish its initial impact using robust qualitative and quantitative methods.

**Review of Code of Discipline for students – University of Nottingham**

The approach to student discipline had become overly litigious and misaligned with the university’s overall values and was no longer fit-for-purpose. SUMS consultants provided insight into alternative approaches that were both innovative and more student-focussed, highlighting examples of best practice from across the sector.

**Impact of Our Work**

- > Awareness and acceptance of the need for fundamental change
- > Innovative solutions that drive culture and mindset shift
- > Improved cultures and behaviours

**What We Do**

- > Reviews of institution-wide approaches, with evidence-informed recommendations for change
- > Partner with you to create tailored, forward-looking and aligned change plans
- > Help you analyse data and evidence, from within your institution and across the sector
- > Act as an objective partner to facilitate open, honest discussion across your institution

The resulting report with evidence-based recommendations was well-received by the leadership to inform their way forward.

*“All students should be able to study in higher education without risk of harassment or sexual misconduct. This new work by SUMS will enable the OfS to evaluate the changes the sector has made in response to our statement and to understand the extent to which students feel safe and supported throughout their time at university.”*

**AMY NORTON**  
HEAD OF EQUALITY, DIVERSITY AND INCLUSION,  
OFFICE FOR STUDENTS



Race and Ethnicity

Across the sector, increasing numbers of universities are working to address inequity as a result of race and ethnicity. We have seen new strategies developed, policies drafted and websites updated – but we know this is not enough. Leadership commitment to change is also a growing area of strength for the sector. Universities need to make tangible changes that deliver impact for their communities. SUMS consultants have supported institutions to shift their focus from their short-term activities to the fundamental, long-term change of outcomes they want to see. These assignments aim to change mindsets, perceptions and lived experiences. Our focus is to:

- > Support the open and honest discussion that drives transformational culture shift
- > Partner with institutions to identify the innovative solutions that fit their institutional context.

Our briefing paper, Change Starts Now: Making HEIs Racially Inclusive, covers extensive insight into approaches to supporting staff and students; leadership of equality, diversity and inclusion; creating an anti-racist university; and sector-wide race initiatives.

Assignments Include:

Race Strategy Review – University of St Andrews

SUMS consultants supported the institution to translate their strategic commitment to race equality into transformational culture and behaviour change. They supported and facilitated discussions to build trust. The institution has an ambition to achieve Race Equality Charter status and SUMS’ work helped them identify ways to ensure sustained change and ongoing open discussion.



Our experience of sector-level insight and institution-specific practice means we are well-placed to anticipate and predict the challenges that universities must address in the coming years.

Statutory Requirements

Current guidance from the OfS will become a statutory requirement from next year, so universities will want to review their practice and identify areas for improvement and compliance. This follows the pattern we have already seen with the UUK Stepchange Framework for Mental Health and we expect a move towards further regulation in these areas. SUMS consultants have extensive experience of strategic culture and behaviours work.

Student-Centred Approaches

We are already seeing a review of student policies and processes that accompanies a return to post-pandemic ‘normality’. For example, many universities adopted a less formal approach to extenuating circumstances

during the pandemic and must now identify a renewed policy. This is an opportunity to modernise and adopt policies that are fairer to students, prepare them better for their future and represent a more effective use of internal resource. SUMS consultants have knowledge of different models that can address the appropriate balance of power and be tailored to institution-specific contexts.

Decolonising the Curriculum

Forward-thinking universities are creating student-staff networks and working groups to lead activity in this area. Grassroots activity is exploring what decolonising the curriculum means in different Schools and how this should be development into meaningful and measurable action plans. An important part of the Race Equality Charter, decolonising curricula requires a fundamental paradigm shift and the authentic dedication of resources to enable this. Through our work universities across the UK, SUMS can help institutions move this forward with authenticity and impact.



# Case Study: Race and Ethnicity Strategy Review

**Who We Worked With**  
St George’s, University of London

**The Situation**  
As part of their approach to equity, diversity and inclusion across the institution, St George’s were carrying out an internal Race Equality Review. They asked SUMS consultants to support this work, acting as objective outsiders to clarify the University’s ambitions and to support the building of consensus, collaboration and commitment to constructive change.

**What Happened**  
The SUMS consultants reviewed the current approach to race equality at the University and how it speaks to the University’s approach to EDI more generally. They used the development of an anti-racist policy as a particular focus, facilitating and supporting conversations with a view to transitioning from discussion to

ongoing culture change.

Assessing current practice gave the consultants the opportunity to identify areas of innovation and effectiveness within the institution. They were also able to provide comparison to best practice elsewhere within the HE sector and beyond. They partnered with the internal team to make recommendations for practical steps to

- What We Do**
  - > Reviews of institution-wide approaches, with evidence-informed recommendations for change
  - > Partner with you to create tailored, forward-looking and aligned change plans
  - > Help you analyse data and evidence, from within your institution and across the sector
  - > Act as an objective partner to facilitate open, honest discussion across your institution





*"It was helpful to have a critical friend to support us in building a culture of open and honest discussion, enabling us to move forward constructively. The recommendations made by SUMS were tailored to our community and our culture."*

**DR VANESSA HO**

DEAN FOR EDI,  
ST GEORGE'S, UNIVERSITY OF LONDON

address immediate challenges and longer-term strategies to develop cultural change and address equity.

### The Difference It Made

The support of SUMS consultants with this work helped to build the confidence of St George's internal EDI team. We looked at their organisational culture and partnered with them to find solutions tailored to their specific situation. Following the review, appropriate governance has been developed to ensure that the culture of open discussion can be supportive in driving ongoing culture change that delivers racial equity.



# Wellbeing and Mental Health Services

The mental health and wellbeing needs of students and staff are an important area for universities to address. SUMS consultants combine extensive experience in this field from an HE sector perspective and from a clinical practice viewpoint. This dual aspect proves invaluable for supporting our members and clients to review their

unique situation and demographics, and to identify the tailored solutions that will be successful in their context.



### Policy and Wider Landscape

The number of students coming into HE with mental health issues or developing them while there is continuing to increase. This is exacerbated by the impact of the Covid-19 pandemic: students are suffering from reduced socialisation and community opportunities in the years before attending university. This is combined with an ongoing reduction in the societal taboos related to speaking up about mental health challenges, especially amongst younger people. Expectations and demand for support are therefore increasing.

At SUMS, we are working with a range of institutions to apply the UUK Stepchange framework to review their approach in a strategic and joined up way. This work supports fundamental

shifts in universities’ support provision for their students and staff. We bring examples from within and beyond the sector to help them identify best practice. In Wales, we support institutions to meet the mandate from HEFCW to use the UUK framework.

### Assignments Include:

#### Preparing for University Mental Health Charter accreditation – Durham University

SUMS consultants are working with the Vice Chancellor to prepare for an application for accreditation through the University Mental Health Charter. Our role is to support her vision of using this process to spark fundamental and cross-institutional development in this area.

#### Assessment Against the UUK Stepchange Framework – Aberystwyth University, Bangor University and Cardiff

*“[A whole university] approach balances the opportunity for prevention and early intervention and the importance of open conversations about mental health with the need for appropriately resourced and effective support services.”*



### UUK STEPCHANGE FRAMEWORK

#### Metropolitan University

SUMS consultants are carrying out an impartial review of several institutions’ position against the framework, with the aim of developing an overarching strategy for future developments. This forward-looking approach comes from a desire for a fundamental shift to a whole university approach.

#### Whole-Institution Approach

The evaluations that SUMS consultants carry out for our clients

### What We Do

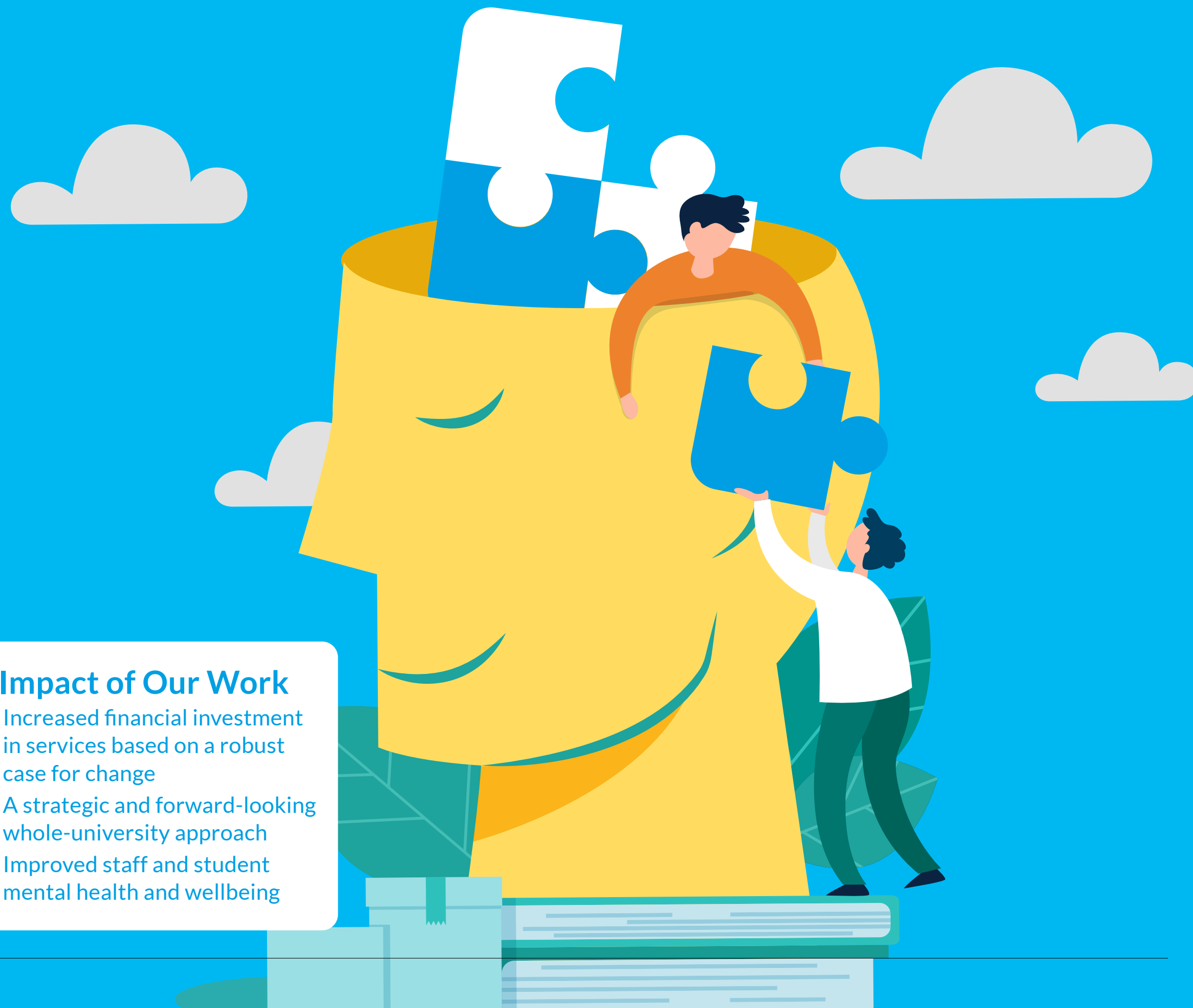
- > Reviews of institution-wide mental health and wellbeing provision, with evidence-informed recommendations for change
- > Partner with you to create forward-looking and aligned change plans
- > Help you analyse data and evidence, from within your institution and across the sector
- > Partner with you to develop staff wellbeing and culture change initiatives

are driven by a recognition that supporting the mental health and wellbeing of students and staff is a strategic priority. For university life to authentically promote and support student and staff mental health, everyone must work together. Our reviews often result in restructuring of teams and support, designed around students' and staff's support needs rather than administrative silos.

A whole university approach also addresses the impact of an institution's culture and behaviours. The connection between staff and student mental health is increasingly recognised. The last two years have been tough - and universities are seeing high levels of staff burnout. A number of SUMS assignments have addressed the staff wellbeing impact of significant change programmes, such as new ways of working and Target Operating Models.

### Impact of Our Work

- > Increased financial investment in services based on a robust case for change
- > A strategic and forward-looking whole-university approach
- > Improved staff and student mental health and wellbeing





**Assignments Include:  
Resilience Workshops –  
London School of Economics**

As part of our support for the institution to identify a new people and HR system, SUMS consultants ran a series of development workshops with the HR teams. Moving from a largely manual system to a more automated approach will require activities and roles that look very different for individuals. The workshops are focussed on self-awareness and resilience to cope with change.

**Strategic Review of Student  
Mental Health Provision and  
Services – University of Cambridge**

SUMS consultants carried out a review of provision and services across the collegiate university, using a consultative and engaging approach. We put forward a case for change and tailored recommendations to solve challenges identified, which have resulted in a commitment to significant investment.



Our combination of strategic insight and practical recommendations means we are well-placed to anticipate and predict the challenges that institutions must address in the future. With the number of students needing support for their mental health still rising and the pressures that staff face also increasing, this is an area that universities will continue to prioritise.

**Data-Led Early Intervention  
and Prevention**

We believe that the use of AI and data analytics to identify students who may have issues will become a standard approach. This type of insight will enable universities to provide targeted earlier interventions, from small ‘nudges’ to look after their own mental health to more detailed information and signposting to other services. Pilots of this approach have received positive feedback from students, who often have an expectation of, and engagement with, digital solutions

that seem more challenging to some staff.

**Better Integration with  
NHS Services**

Universities are not healthcare providers. They require partnerships with NHS providers, at both a strategic and operational level. The healthcare system is complex and structured differently across geographies. Partnerships between universities, NHS services and other public services have been trialled in Liverpool, Cardiff and Manchester. These, and other, Office for Students-funded projects are now entering evaluation stage, leading to evidence of what works well within the different models trialled. SUMS is well placed to share this best practice knowledge with our members and to partner with them to apply it for their context.

**Staff Mental Health  
and Wellbeing**

With an improved focus on staff wellbeing, institutions must recognise

the need for workplaces which are safe, supportive, and inclusive. The importance of transformational culture change as a key driver to long-term success will necessitate matching individuals’ experiences to the messages they receive. At SUMS we know that innovative solutions will be required, including in the areas of leadership and management development. We are already working to identify common needs for development and explore targeted solutions.



# Case Study: Strategic Review of Mental Health Provision and Services

**Who We Worked With**  
University of Cambridge

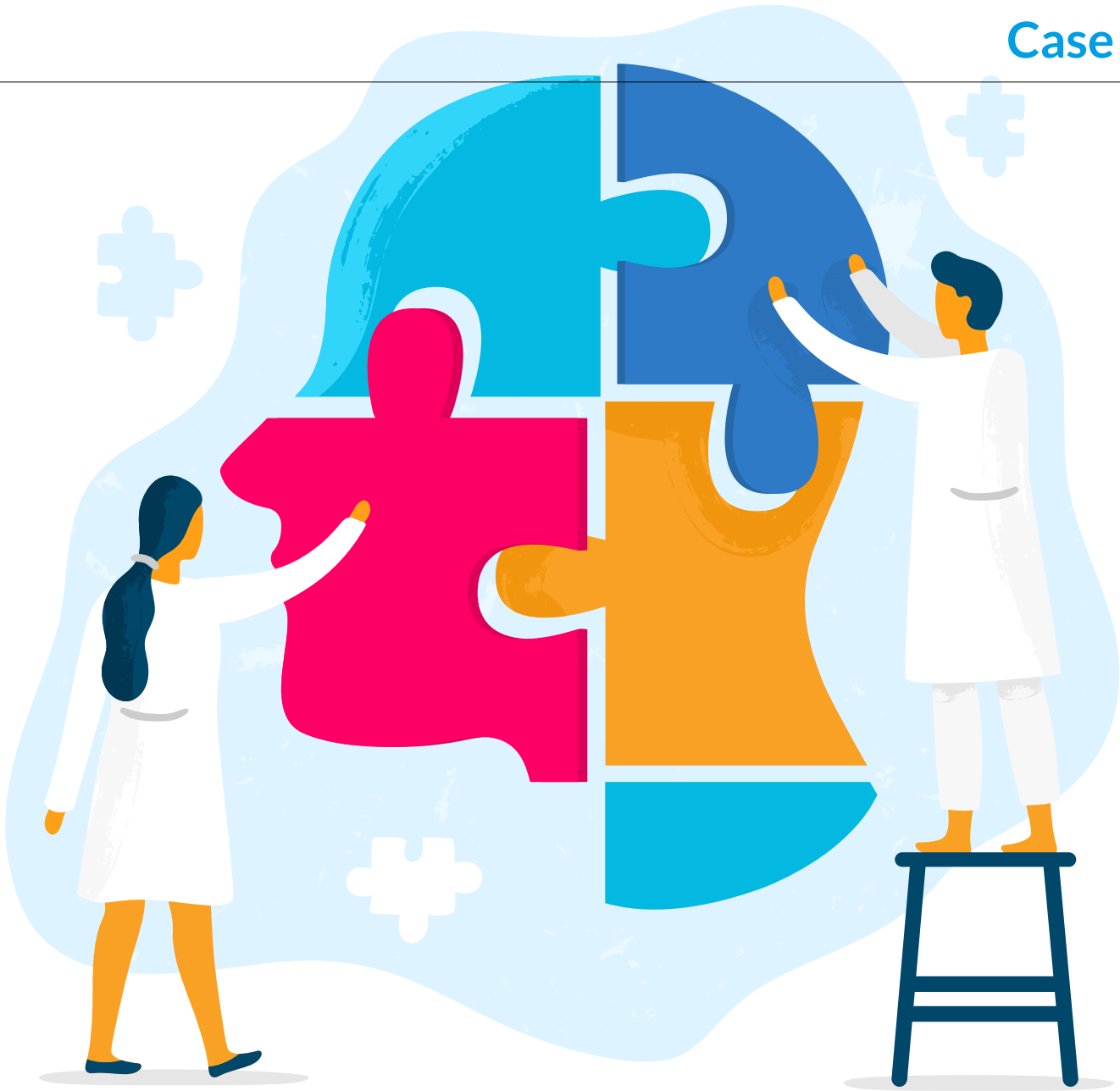
**The Situation**

Multiple changes and trends are evident across the higher education sector, and society more generally, which are affecting both demand for and provision of mental health and wellbeing services by universities. In common with the whole sector, the University of Cambridge was experiencing increased demand for student mental health and wellbeing support services. The collegiate University was spending increasing amounts of staff time and both college and University funds on supporting student mental health, particularly due to the rising student expectations of and demand for providing counselling support. Cambridge was aware of its distributed

approach to the provision of mental health and wellbeing support across the central University, colleges, schools and departments. The University also wanted to work in a more ore integrated way with NHS services to better support students. As a result, the collegiate University decided to redefine its role in relation to the mental health and wellbeing of its students and to better structure and deliver future support.

**What Happened**

SUMS consultants Helen Baird and Dr Alison Oldam worked with the University in a two-phased approach. The first phase involved extensive consultations with the senior leadership, academic and professional and support staff and also with students across the collegiate University over an 8-month period. The SUMS team



*“Our SUMS consultants really understood us and the aspects that make our collegiate University unique. They worked closely with us as a true partner and took the time for a broad, consultative approach. The resulting recommendations were tailored to our specific situation rather than being an off-the-shelf solution. We believe this will strengthen both our preventative work and responsive interventions to supporting our students’ mental health and wellbeing.”*



**ALICE BENTON,**  
HEAD OF EDUCATION SERVICES, UNIVERSITY OF CAMBRIDGE



began by assessing existing student mental health provision and services, demand and costs, then making the case for change in specific areas. In the second phase, SUMS engaged iteratively with senior leaders, staff and students to help create the blueprint for a more holistic, effective and sustainable approach for mental health and wellbeing provision and services.

Our subsequent recommendations were designed to help transform Cambridge's student mental health and wellbeing support, covering both preventative work and responsive interventions across the collegiate University. The aim is to create well-coordinated, efficient and flexible mental health and wellbeing support, which provides care and support at the right level and at the right time to ensure that

students can meet their academic potential.

### **The Difference It Made**

Implementing the changes at Cambridge will provide clear, fair and consistent access to support services. This will be underpinned by a stepped care approach with a clear emphasis on prevention as well as multidisciplinary wellbeing teams, and more integrated working with NHS services.

The University recognises that significant change is required across the current operating model and has committed to the initial investment in systems, processes and people to deliver this new model. They are adopting a three-year, co-ordinated programme of transformational change that is suited to the collegiate University. Ultimately, the new approach will improve support for students and provide the best environment for them to thrive academically and personally.

# Learning and Teaching

Universities were already thinking carefully about future approaches to learning and teaching. The changes enforced by the pandemic and its immediate aftermath have only heightened the importance of making a longer-term, strategic assessment of this core institutional focus.

Institutions are assessing the capabilities and capacity required to deliver a new approach. This covers interlinked and evolving areas such as curriculum design, digital teaching methods, timetabling requirements and aligning physical space configuration with pedagogy. By becoming more consistent and efficient, universities have the potential to enhance quality and drive significant growth.

## Models of Learning

Universities are considering how

they might package blocks of learning in innovative, non-standard ways. They are assessing how new offers could better suit the needs of current and future generations of learners, as well as other stakeholders such as employers. They are looking at how they can diversify their offer and do so in a way that is consistent, efficient and supports institutional resilience.

Methods of delivery are evolving, with approaches varying across institutions but increasingly moving away from solely focussing on traditional synchronous and co-located methodologies. We are hearing a range of terminology too, with blended learning and hybrid learning among the most common terms used.

Universities come to SUMS for help to identify the approaches that







will work best for their context and institutional culture. We partner with them to build momentum from their early adopter programmes and disciplines, to share knowledge about innovative approaches and impact across their university community.

**Assignments Include:**

**Apprenticeships Lifecycle Development – University of the West of England**

SUMS consultants were asked to pull together a lifecycle for an apprentice, interweaving requirements for compliance with the Education and Skills Funding Agency (ESFA) and Ofsted with the standard learner lifecycle. This enabled conversations with stakeholders at UWE to fully understand specific requirements in relation to apprenticeships and in particular the importance of data in decision-making. Following this initial assignment, the SUMS Group

have been involved in support for procurement of an apprenticeship management platform.

**Support to Deliver**

Achieving alignment between learning and space has been a long-standing matter of concern and new methodologies are exacerbating the issue. The delivery of a pedagogically innovative session could be impoverished due to a classroom that is not aligned, for example if the configuration of furniture does not support group learning or the audio-visual equipment does not work well.

A strategic campus-wide approach to space and timetabling is required which spans a range of learning spaces to suit different learning activities and also incorporates the use of on-demand spaces for use outside timetabled hours. Leaders, educators and professional service teams must make informed data-driven decisions about the most effective use of resources.

**What We Do**

- > Contribute to building of strong business case
- > Articulate financial value of the risks from non-compliance
- > Produce evidence and insight for strategic decision making
- > Provide tools for members to assess their own activities and performance

Service departments in HE are serving a highly complex and diverse community in an ever-changing environment. SUMS consultants are therefore seeing increased demand for assistance with the digital support and people change aspects of innovative delivery and remote or mobile working. Digital transformation requires a whole-university, strategic approach, including a review of service support roles.

**Impact of Our Work**

- > Appropriate investment
- > Better risk management
- > Move from ad hoc non-standard delivery to consistent business as usual that enables appropriate growth

Assignments Include:

Apprentice Lifecycle Asset

**- All Members** SUMS consultants have developed an asset which visualises the apprentice lifecycle and the complexities in relationships between the different stakeholders. It has been devised to help member institutions think about how they can improve their practice in this area, empowering them to analyse milestones, tasks, data, risks and the key decisions they must take for success.

Programme Complexity – University College London (UCL)

After a review confirmed that UCL’s programme portfolio was unnecessarily complex, the Director of Change and Improvement was looking for an external partner with expertise in programme complexity to help shape and augment their understanding of their data. SUMS supported UCL to define key metrics for programme complexity and explore ways of illustrating these metrics to, ultimately, create a framework for self-assessment and reduce complexity.



We anticipate that learning and teaching expectations, requirements and design will continue to evolve in the future and that the impact on university activities will be significant.

Micro-Credentialing

The Government drive for lifelong learning that sees significant upskilling of the population will encourage institutions to consider how they package knowledge into bite-size chunks of learning that fit with a broader range of lifestyles. In addition to the pedagogy, they will need to look at the practicalities of teaching these courses, the allocating and potential transfer of credits and the financial impact of delivery. SUMS consultants have extensive experience of successful learning and teaching delivery models, strategic analysis of capabilities and the complexities of curriculum design.

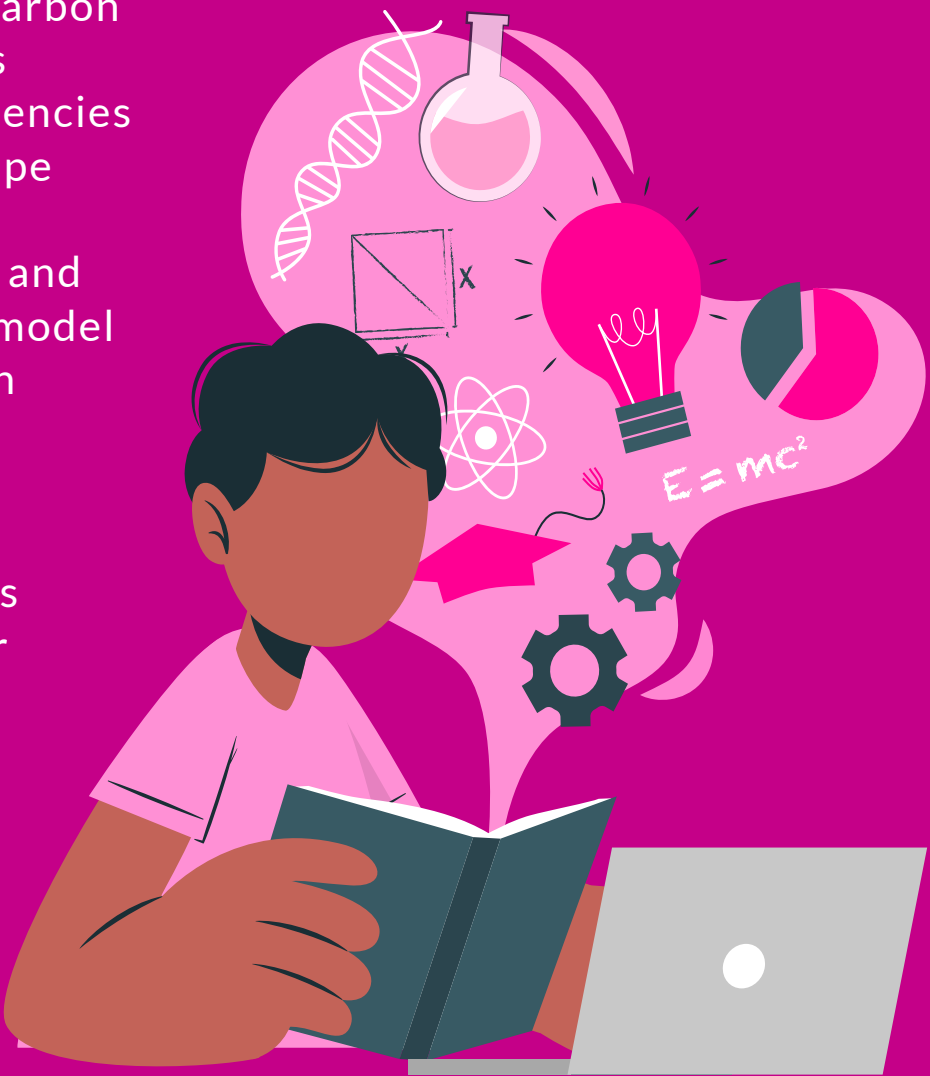
Space and Timetabling

We anticipate an increased focus on the use of timetabling expertise to support improved use of resources, especially space. Better use of physical space will also be recognised as a potential solution to address financial constraints and impact an institution’s carbon footprint. SUMS consultants understand the interdependencies across the academic landscape – people, workload, space, timetabling, systems, data – and we already have a maturity model that covers timetabling as an institutional capability.

Investment Decisions

New teaching methodologies require a change in focus for institutional investment, towards investing in digital enablers such as cloud-based technology and SaaS (software as a service) solutions. This constitutes a change from capital to recurrent investment.

Across the SUMS Group we have the expertise to assist with the strategic considerations for building business cases for investment and the procurement specialists to support effective, compliant purchasing of solutions.



# Case Study : Apprenticeships Lifecycle

## Who We Worked With

University of the West of England (UWE)

## The Situation

Apprenticeships are a growing area of delivery for many SUMS members. Alongside the Education and Skills Funding Agency (ESFA) and other professional, statutory and regulatory bodies, Ofsted has become involved in assuring the academic quality and other relevant standards of higher degree apprenticeships. Compliance or non-compliance with any or all of these regulatory bodies will have significant financial and reputational impacts. Both expansion of provision and compliance require a strategic cross-institutional approach to provision of apprenticeship programmes.

## What Happened

The UWE Strategic Programmes Office asked SUMS consultants to review its apprenticeship offer. While there were pockets of knowledge and experience across the institution, it became apparent that the many staff did not adequately understand the similarities and differences between standard students and apprentices, and between degree programmes and apprenticeships to support their part of underpinning delivery model.

To inform this work, SUMS drew up an apprentice lifecycle, interweaving ESFA and Ofsted compliance requirements with the standard learner lifecycle. This enabled conversations with stakeholders to fully understand the specific requirements for apprenticeships. It highlighted the







*“SUMS’ support was invaluable in helping us better understand the regulatory complexities of the apprenticeship lifecycle in relation to our operating model and set the groundwork to take our apprenticeship offer to the next level across the University. The holistic approach that SUMS was able to provide by then supporting with the procurement process meant we had continuity and HE-specific expertise throughout the project.”*

**DAVID BARRETT**

DIRECTOR OF APPRENTICESHIPS, UNIVERSITY OF THE WEST OF ENGLAND (UWE)

importance of data in decision-making and the impact of the multi-way relationship between the learner, their employer and the HE provider.

These discussions led to a better understanding of how the institution could enable growth in its provision of apprenticeships by moving to a more strategic, cross-university approach that incorporated administrative and financial processes, systems and data.

The apprenticeship lifecycle asset and SUMS’ insight into the risk of non-compliance fed into a business case for funding to put a change programme in place. As part of this programme, the SUMS consultant, bringing in expertise from SUMS Group procurement division SUPC, then supported the internal team through the procurement process for an apprenticeship management platform. The

consultant helped deliver tender documents that addressed the user journey, business and information requirements and integration planning.

### **The Difference It Made**

The team at UWE was able to think about how they could improve support for apprentices and apprenticeships across the institution. They were able to look at where processes could be integrated and where differences between apprentices and standard learners are material and require specific support. They have also been able to consider aspects of internal capabilities, data, information and risk. These considerations are all adding up to a more strategic approach to apprenticeships that will drive growth and improvements to learner experience and outcomes.



# List of Assignments

In 2021/22, SUMS helped members and clients with over 100 complex and strategic assignments, delivering 1485 consultancy days. Our work covers a broad range of strategic areas across the full breadth of professional services. While this is not a definitive list, here are some examples of the assignments we have delivered.

- Academic Development and Admissions Review**  
University of Derby
- Admissions Change Implementation**  
University College London
- Admissions Review**  
Aberystwyth University
- Admissions Review**  
Bangor University
- Admissions Review**  
Middlesex University
- Advancement and Fundraising Review**  
University College London
- Apprenticeships: Operations, Benchmarking and a Case for Change**  
University of the West of England, Bristol
- Audit, Risk and Assurance Committee Review**  
Newcastle University
- Business Case for Health Education Building**  
University of Nottingham
- Business School Strategy Development**  
University of Leeds
- Business Support Review**  
University College London
- Change Management Framework**  
University of Nottingham

- Coaching for Service Delivery**  
University of Hertfordshire
- Code of Conduct and Disciplinary Review**  
University of Nottingham
- Committee Operations Support Review**  
Newcastle University
- Contract Management Support**  
Oxford Brookes University
- Council Effectiveness Review**  
University of Surrey
- Course Selection and Curriculum Management**  
London School of Economics and Political Science
- Creating an Integrated Student Experience**  
University of Durham
- Critical Friend and Mentoring Support**  
Goldsmiths, University of London
- CRM Implementation**  
University of Leicester
- CRM Mapping for Student Recruitment**  
University of Hull
- Data Governance and Landscape Review**  
University of Nottingham
- Data Landscape and Strategy Review**  
University of Nottingham
- Digital and User Experience Audit**  
University of Hull

**Employer and Enterprise Engagement Strategy for Careers**

Trinity College Dublin

**Establishing Sustainable Travel Principles**

University of Reading

**Evaluation of the Impact of the Office for Students’ Statement of Expectations**

Office for Students

**External Programme Assurance**

University of Durham

**Faculty Futures: Target Operating Model Support**

University College London

**Finance and Human Resources Review**

Bournemouth University

**Future Ways of Working**

University of Leeds

**Human Resources and Payroll System Review**

London School of Economics and Political Science

**Institute of Dentistry Culture Change**

University of Aberdeen

**Internal Communicatons Review**

Queen Mary University of London

**Library Service: Review of Customer Services**

University of Leeds

**Management and Administration of Non-standard Teaching Activities Review**

University of Sussex

**Market and Pricing Strategy for Academic Programmes**

University of Nottingham

**Mental Health Provision and Services Strategic Review**

University of Cambridge

**Mental Health Review and Strategy Development**

Staffordshire University

**Mental Health Services Review**

Aberystwyth University

**Microcredentialling and CPD Courses Support**

University of London

**Planning and Performance Improvement**

University of Nottingham

**Planning Review Support**

Nottingham Trent University

**Portfolio Management Post-Implementation Review**

Cardiff University

**Portfolio Management and Governance**

University of Nottingham

**Positive Futures Research Culture Review**

University College London

**Procurement Maturity Assessment (PMA+)**

Multiple universities

**Procurement Programme Support**

Aberystwyth University

**Procurement Support for Laboratory Refit**

Rosalind Franklin Institute

**Procurement Transformation Implementation Support**

Aberystwyth University

**Race and Ethnicity Review**

University of St Andrews

**Race and Ethnicity Strategy Review and Development**

St George’s University of London

**Recovery Programme Support**

Goldsmiths, University of London

**Recruitment and Admissions Review**

Queen Mary University of London

**Research and Innovation Target Operating Model**

University of St Andrews

**Research Impact Evaluation**

University of Reading

**Research Services Target Operating Model**

University of Oxford

**Research Strategy Support (Benchmarking)**

University of Bristol

**Review of Research and Innovation Support and Environment**

University of St Andrews

**Review of Study Skills Support**

University of Hertfordshire

**Risk Review**

School of Oriental and African Studies (SOAS)

**Russell Group Medical Schools Benchmarking**

Multiple universities

**Scholarships and Bursaries Review**

University of Nottingham

**Security Tender Support**

University for the Creative Arts

**Self-Assessment Against the UUK Stepchange Framework**

Cardiff Metropolitan University

**Sponsor Development Programme Support**

University of Bristol

**Step Change Audit and Implementation Plan**

Bangor University

**Strategic Culture Review**

University of Hertfordshire

**Strategy and Change Maturity**

University of Nottingham

**Student Administration Post-Implementation Review**

University of Hertfordshire

**Student Administration Services Management Support Programme**

University of Hertfordshire

**Student Journey Mapping and Business Process Review**

University of Wolverhampton

**Student Recruitment Review**

King Abdullah University of Science and Technology

**Student Services and Faculty Administration Review**

University of Hull

**Student Support and Related Functions Review**

University of Hertfordshire

**Supporting the Development of a New London Campus**

SP Jain School of Global Management

**Supporting University Consolidation Processes**

Fahrenheit Universities

**Target Operating Model**

Cardiff University

**Target Operating Model**

Liverpool School of Tropical Medicine

**Target Operating Model**

University of Derby

**Timetabling Review**

Leeds Beckett University

**Timetabling Review**

London School of Economics and Political Science

**Transformation Function Benchmarking**

University College London

**Web Insight and User Experience Review**

University of Nottingham

**Wellbeing and Mental Health Service Review**

University of Durham

**Wellbeing and Mental Health Strategy Implementation Support**

Aberystwyth University



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