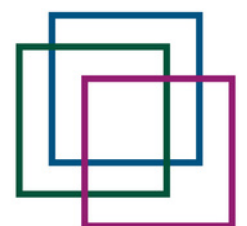


Where Are You Going? How Will You Get There?

SUMS
Consulting

Strategy, Planning & Transformation Portfolios

Our Strategy, Planning and Transformation Portfolio support offers a holistic and grounded approach for universities to develop an ambitious strategy and turn it into reality.



SUMS group
SPECIALISTS IN HIGHER EDUCATION

Five Step Strategy Development Process

How do you develop a long-term strategy for your university?



Cut through the complexity with our five-step process for strategy development:

1. Scope your project
2. Understand your position
3. Bring together
4. Consult and engage
5. Finalise

The process will be tailored appropriately to your bespoke context and needs and, will allow you to:

- Articulate and focus on what is most important for your institution, grounded in your core mission
- Understand your operating environment and option space
- Leverage your distinctive strengths
- Identify and respond to opportunities and threats
- Develop realistic and evidence-based strategic objectives, prioritising and linking them for optimal impact
- Engage your community towards a shared purpose

What will you gain?

Our structured yet tailored approach allows you to reach informed decisions grounded in what really matters to your institution, and engage your community in the process.

Talk to us about how we can help

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0118 378 4304

Rapid Strategy Stocktake

How can you quickly take stock of your strategy's progress to date, and if need be adjust its course?



It may be several years since you developed your institutional strategy and no doubt a lot has happened in the meantime.

At this juncture, you may be keen to take stock of your strategy's progress to date and future trajectory, and assess the case for making some adjustments.

The Rapid Strategy Stocktake module is a shorter and lighter process than a full strategy development exercise and will allow you to:

- Focus on the most important issues to support decision-making, appropriate to the circumstances
- Assess what is going well and what is not going so well, and evaluate your options for modifying your objectives or changing course
- Engage with the right people to the degree that you need to build awareness and buy-in for continuing or refreshing your strategy
- Make well-informed decisions on the future course of your strategy, grounded in up-to-date evidence

What will you gain?

You will achieve a quick assessment of your strategy's progress and trajectory, focusing on what matters most and allowing you to either confirm or adjust your course.

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Strategy Delivery Model

How can you best set your strategy up for success?



Delivering your strategy calls for coordination of resources across your institution, including transformation initiatives and your “Business As Usual” (BAU), which includes most of your core business in teaching and research, as well as the ongoing activities which support these.

In this module, SUMS will help you plot a holistic approach to turning your strategy into reality by:

- Balancing the complementary imperatives of “running the business” and “changing the business”
- Establishing a clear and measurable expression of where you are now and where you are going
- Supporting evidence-based planning and evaluation coupled with strategic use of targets/KPIs
- Stimulating dialogue and instilling ownership with the right people and structures to support successful strategy delivery across your institution
- Establishing clear parameters for your planning framework and your transformation portfolio

What will you gain?

Develop a plan allowing you to clearly define, control and evaluate the delivery of your strategy, balancing the two crucial elements of ongoing business and change.

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The Elements of Planning

How do you align your planning model to manage and evaluate progress towards your strategic goals?



Planning is your best tool for balancing resources, managing incremental progress towards your strategic goals, and supporting the overall sustainability of your institution. To plan effectively, you need to link conversations across all your academic units and support functions.

SUMS will review your planning model, including the structures, processes and frameworks around planning at your institution, to ensure it is designed optimally to achieve your objectives. The full version of this module involves the following elements, which can also be taken in isolation as discrete engagements:

- Planning process: mapping and refinement to optimise workflow in support of planning objectives
- Planning structures: aligning where the main planning activities take place with the roles of critical stakeholders and resourcing/capability in key areas
- Planning framework: establishing a framework of key performance indicators (KPIs) to define, control and evaluate progress towards your objectives from short to long-term planning horizons, drawing out the most effective use of data linking your planning and budgeting processes
- Resource allocation model (RAM): reviewing your system for allocating income and costs to best support your planning objectives

What will you gain?

The module will help you fine-tune your institution's approach to planning to reflect where you are and where you want to be. This will enable the most effective progress towards your goals.

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Establishing a Portfolio

How do you make a step-change in the benefits your institution gets from change?

Do you know how many change projects and programmes are underway at your institution? Do you know how much you are investing in them, what return you will get and how you will leverage the benefits? If the answer is “no”, consolidating your major change initiatives into a portfolio could be transformative for your institution.

Effective portfolio management allows you to:

- Prioritise your resources to ensure the change initiatives you undertake are the most beneficial to the institution
- Streamline delivery including finance, resources and dependencies between initiatives
- Take a whole view of risk management at the aggregate level
- Optimise return on investment (ROI) for your institution through integrated planning and benefits management
- Build buy-in for change through transparent and accountable approaches which foster dialogue and engagement with your stakeholders

SUMS will work with you to:

- Understand the profile of initiatives underway at your institution
- Establish a transformation portfolio appropriate to your conditions, ensuring you can achieve and make use of maximal benefits from your investments in capital projects and business change
- Develop appropriate governance and management frameworks and, if required, establish a portfolio office function

What will you gain?

You will get a clear and quantified view of the transformation landscape at your institution, allowing you to plan change effectively and make the best use of the benefits in your BAU.

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Rapid Portfolio Review

How can you refine your transformation portfolio to ensure the maximal benefits for your institution?



You may already have a transformation portfolio at your institution. In this module, we will use a rapid assessment exercise to ensure the maximal effectiveness of your portfolio, covering themes such as:

- Strategic alignment
- Benefits management
- Risk management
- Governance and control structures
- Evaluation framework
- Financial planning

If desired, this can also involve a re-definition of the portfolio.

What will you gain?

You will ensure your transformation portfolio is set up for success, allowing you to plan it most effectively and make the best use of the benefits in your BAU operations.

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Micro Case Studies

You are in safe hands with SUMS. Here are some examples of our work in this area.



Five Step Strategy Development Process

We worked with the Royal College of Art to map its environment and strategic direction and prioritise strategic objectives over a series of workshops.

Rapid Strategy Stocktake

We conducted a rapid refresh of the University of Greenwich's digital strategy, engaging the key stakeholder groups across staff and students to sense-check the prioritisation of initiatives and roadmap for delivery.

Strategy Delivery Model

For the University of Hull, we conducted a benchmarking study on strategy, planning and change, focusing on how institutions integrate their strategic change agendas into their planning cycles.

The Elements of Planning

We reviewed the Integrated Planning Exercise process (IPE) at the University of Leeds, as the University embarked on the delivery of its new ten-year strategy.

Establishing a Portfolio

We supported the University of Nottingham to establish a University Strategic Change Portfolio, enabling coordinated governance of the University's most complex and impactful change initiatives.

Rapid Portfolio Review

We reviewed the University of Essex's maturity in portfolio management, benchmarking against sector practice and developing a roadmap for the University to optimise its portfolio to support the delivery of its Strategic Plan.

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