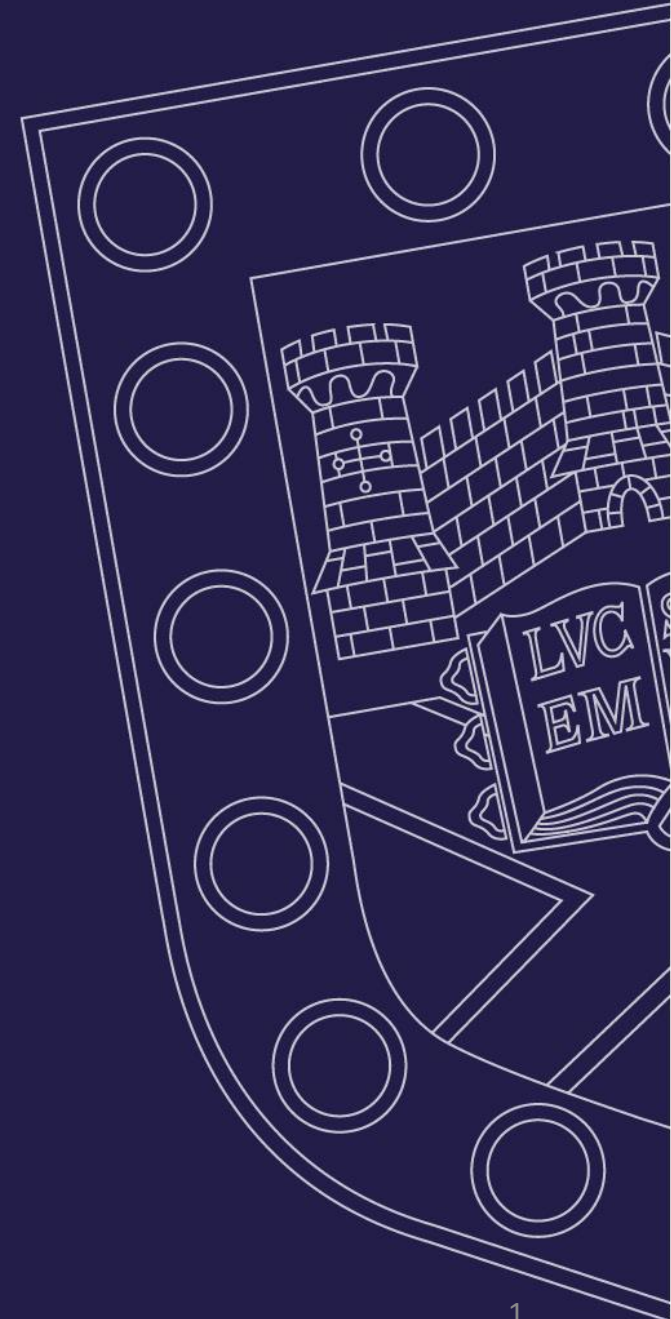# The Three Key Principles Institutions should adhere to in times of Economic, Political and Societal Turbulence

In other words…. What makes Good Leadership During Times of Major Change?

Mike Shore-Nye

Registrar and Secretary, University of Exeter

29 November 2018

Introduction – Mike Shore-Nye

- Joined the University of Exeter in January 2016 as Registrar and Secretary

- Responsible for the institutions entire Professional Services Team

- Ensures effective and efficient operations and governance of the University

- Member of the Senior Management and Vice Chancellors Executive Group

- Major role in the development and implementation of the major strategies and plans that enable the University to fulfil its mission and vision

- Secretary to Council

- Responsibility for Capital Investment Strategies for Estate and IT Infrastructure and the launch of the Professional Services Strategy

Outline of the session

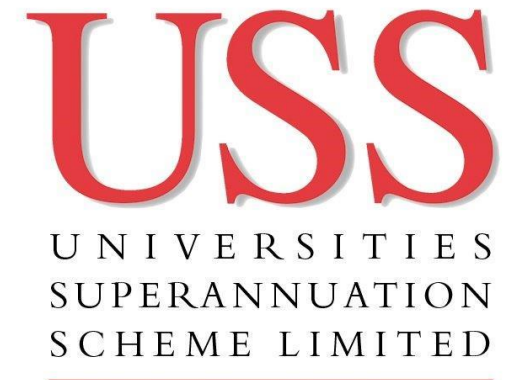*What three key principles institutions should adhere to in times of economic, political and societal turbulence?*

The Challenge!

We won't bail out failing universities, says higher education regulator

We're reviewing education & funding after 18

giving young people **better choice** and **value for money**

Rise in unconditional offers prompts call for university admissions overhaul

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A Case Study – The University of Exeter

Professional Services Strategy

1. Work in Partnership

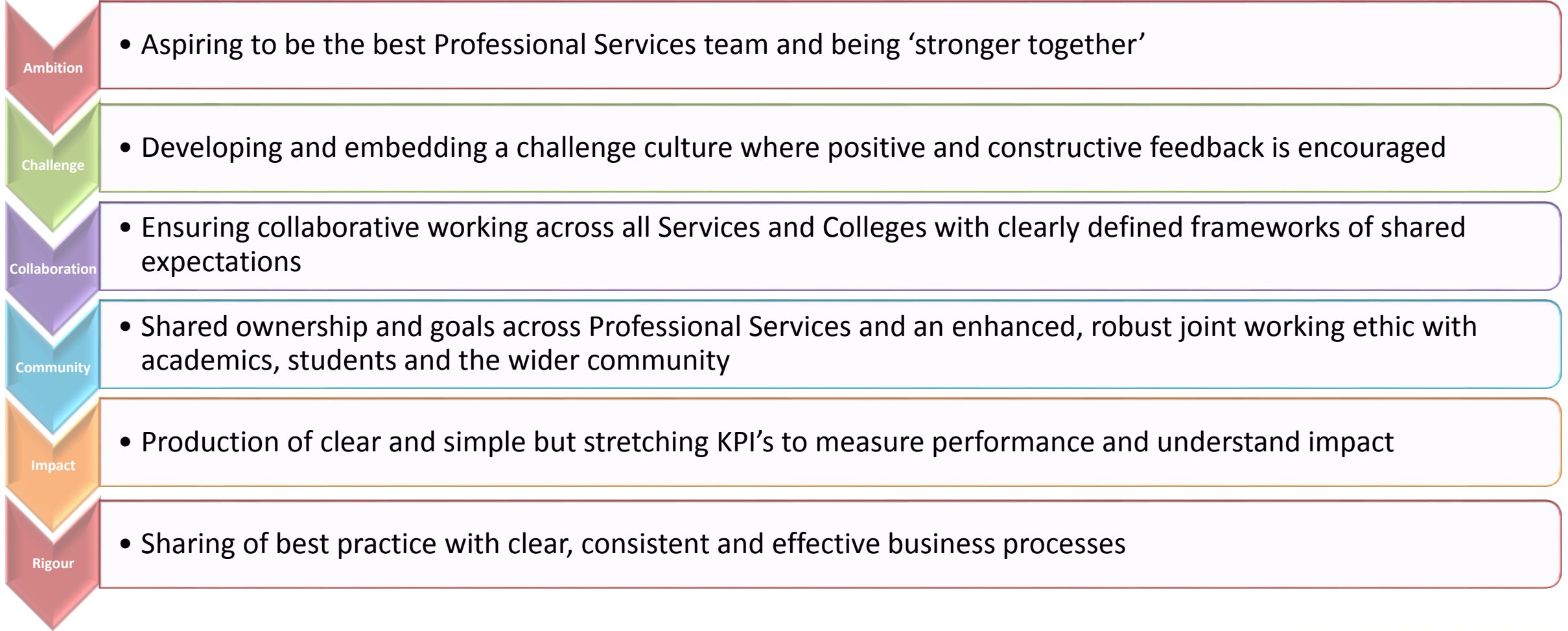2. Ensure Strategic Alignment

3. Adopt a Performance Culture

How did we Develop this Solution?

- New Professional Services Strategy was developed in 2017/18

- Considerable engagement with the Professional Services and Academic communities via 'green paper' approach

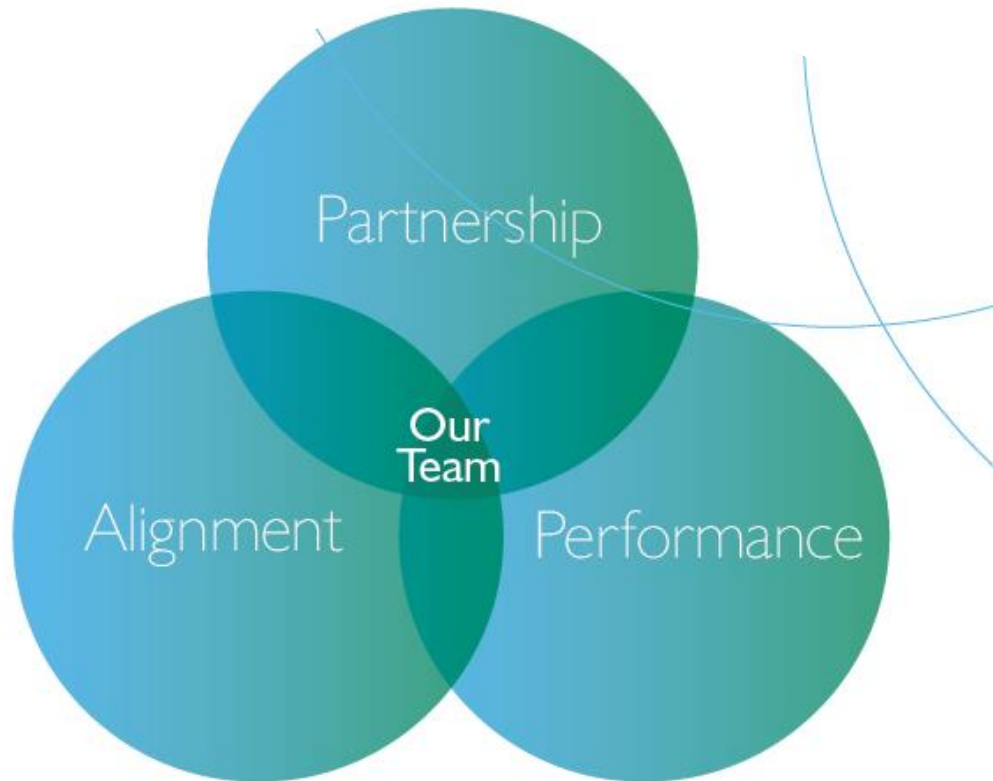- Strategic Delivery Group formed to drive the strategy forward

Portfolio:
Monitoring, reporting, delivery confidence, assurance (CIG, PRG, VCEG, Council), Portfolio dependency and risk management

Strategic Delivery Group

Stakeholder Reference Groups:
Early engagement in involvement in direction, advice on service improvement proposals, feedback on impact of PS operations and services to Colleges and academics

Programme:
Delivery of outcomes, oversight of projects, benefits management, risk management, managing impact on BAU

PS Strategy Board

Provost's Advisory Group

PSLT

Projects:
Delivery of project outputs, manage resources, manage scope, direct activities and project plan

Alignment

Partnership

Performance

Academic Representation on each group

Agree what you will and won't do

Professional Services Values

Ambition
- Aspiring to be the best Professional Services team and being 'stronger together'

Challenge
- Developing and embedding a challenge culture where positive and constructive feedback is encouraged

Collaboration
- Ensuring collaborative working across all Services and Colleges with clearly defined frameworks of shared expectations

Community
- Shared ownership and goals across Professional Services and an enhanced, robust joint working ethic with academics, students and the wider community

Impact
- Production of clear and simple but stretching KPI's to measure performance and understand impact

Rigour
- Sharing of best practice with clear, consistent and effective business processes

Develop a Vision and Plan on how to Implement it

Our 3 Key Principles

"Our vision is for our professional services team to be recognised as the most effective and efficient in the UK's higher education sector.
We will achieve this vision through three key areas of work: alignment, performance and partnerships, and we will use the University's values of Ambition, Challenge, Collaboration, Community, Impact and Rigour to ensure all colleagues are able to share their ideas on how improvements can be made."

Alignment

ALIGNMENT

Alignment focuses on ensuring each of our professional services' annual plans, as well as individual's personal objectives, are aligned to the professional services strategy and fully support the delivery of our institutional strategy

- Providing clarity on the work each so everyone working here knows who to contact should they need support
- Nurturing an open and collaborative culture by encouraging all professional services colleagues to develop their careers
- Using Uniforum benchmarking to ensure our professional services team is able to effectively respond to any pressures in specific areas

Proposed Projects :

- ePDR ✓
- Service Level Descriptors
- Professional Services Size and Shape

Partnership

PARTNERSHIP

Partnership focuses on ensuring we build effective partnerships with our colleagues, our students, and members of the wider university community, by involving them in the creation and delivery of our key professional services priorities and activities so we can continually improve the outstanding support we provide.

- Ensuring all members of the professional services team understand, and can benefit from, the matrix management approach

- Placing our students at the centre of our professional services priorities and activities

- Building connections with our industry partners, and our alumni

Proposed Projects :

- Develop 'students as partners' and 'students for change' schemes

- University-wide CRM System

- PS-wide Enterprise Service Management

Performance

PERFORMANCE

Performance focuses on ensuring we embed a culture of continuous improvement so we consistently strive to be the best we can be, and become recognised as the UK's sector-leading provider of the most efficient and effective professional services.

- Ensuring the University's values are used by leaders and individuals to guide our behaviour

- Using data to assess the quality of the service we provide

- Provide a structured and appropriately resourced development plan for all job families, opportunities for career development

Proposed Projects :

- Development of a PS Leadership Strategy and people development strategy

- Development of a professional services dashboard

Cubane/Data

- In parallel with the development of the strategy, Professional Services have undertaken Cubane's UniForum programme

- Most robust evidence-base we have regarding service effectiveness and cost benchmarking

- Detailed insight into the absolute and relative cost and effectiveness of Exeter's professional services

Engagement

- Engagement with Staff
- Communications – Team Brief and Weekly Bulletins
- Professional Service Conference
- Strategy Workshops
- VC and Registrar all staff talks
- Above and Beyond
- Professional Service Recognition Awards
- Employee Engagement Survey

Lessons Learnt – Strategic Leadership

- Don't stop planning ahead for next academic year and future years

- Avoid career limiting decisions about stopping new investments and capital developments to ensure delivery of future strategies and maintain institutional competitiveness

- View from the bridge – establishing a single view of our portfolio of change activities

- 'Golden thread' – ensuring a demonstrable link between all change initiatives and our strategic objectives

- Transparency - ensure regular meetings with the senior team and Council

- Co-create solutions with your teams in partnership

- Be measured, proactive, proportional and above all prioritised despite competing demands

- Make sure you develop principles that can be adapted to create short, medium and longer term plans

- Change Culture – not seen as a series of one-off events

- Embed change and change management skills as part of the culture and ways of working across the University

- Encourage the institution to embrace change and continuous improvement – need to make sure not every team are terrified that 'they're next'!

- Be compassionate

Lessons Learnt – Tactical Delivery

- Be honest about what can be achieved

- Don't be complacent about business as usual

- Ensure prudent financial management at all times

- Realism - triple check targets and then check again…

- Monitor progress and stay focused on delivery

- Successes and failures of initiatives routinely captured, shared and referred to

- Benefits, benefits, benefits – benefits clearly and consistently defined and baselined from the start

- Implementing a consistent approach to capturing and taking forward lessons learnt from projects and programmes

- Horizon scanning and creating a contingency budget for operational issues/impacts