From: [redacted] (VCO - Staff)
To: Louise Bohn (VCO - Staff)
Cc: David Maguire (VCO - Staff); Jason Brown (FPG - Staff)
Subject: FW: The NOUS event last week...
Date: 19 September 2025 11:54:53
Attachments: CUC Nous presentation 10 Sept 2025.pdf
image001.png
image002.png
image003.png
image004.png
image005.png
image006.png
image007.png
image008.png

Dear Louise

This has come from the Chair. We should probably discuss at some point.

[redacted]
Registrar and Secretary
University of East Anglia, Norwich Research Park, Norwich, NR4 7TJ
Telephone: [redacted]
Mobile: [redacted]
To contact my EA please email [redacted]@uea.ac.uk

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UK Top 25 (Complete University Guide 2023) and **UK Top 30** (The Times/Sunday Times 2024)

UK Top 20 for research quality (Times Higher Education Rankings for the Research Excellence Framework 2021)

World Top 50 (Times Higher Education Impact Rankings 2023)

World Top 100 for research citations (Times Higher Education World University Rankings 2023)

Athena SWAN Silver Award Holder (since 2019) in recognition of advancement towards gender equality for all (Advance HE)

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From: [redacted]
To: David Maguire (VCO - Staff)
Cc: [redacted]
Subject: FW: You're Invited: Nous Autumn Reception | 2 October at Senate House, University of London??
Date: 17 September 2025 15:02:29
Attachments: image001.png
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Warning: This email is from outside the UEA system. Do not click on links or attachments unless you expect them from the sender and know the content is safe.

Dear David,

I hope this message finds you well.

I'm writing to follow up on the invitation to the Nous Autumn Reception on 2 October at Senate House, University of London. We'd be delighted if you could join us for what promises to be a great evening of conversation and connection.

If you're able to attend, please do let me know. And if the date doesn't work for you, I'd be very happy to arrange an alternative time for a catch-up.

Looking forward to hearing from you.

Warm regards,

[redacted]

Nous Group | Principal
d: +[redacted] | m: [redacted] w: www.nousgroup.com

From: [redacted]
Sent: 18 July 2025 5:19 PM
To: david.maguire@uea.ac.uk
Subject: You're Invited: Nous Autumn Reception | 2 October at Senate House, University of London



Dear David,

I hope this message finds you well.

As we reach the end of what has been a rollercoaster year for the sector and as we turn our minds to the new academic year ahead, my colleagues and I would be delighted for you to join us for our Autumn Reception – an evening of conversation, connection, and celebration.
We've deeply valued our collaboration with you and your institution, and this gathering is our small way of saying thank you.

It will be an opportunity to reconnect with peers from across the sector in a relaxed setting over drinks and canapés.

Date and time: 6:30 PM-late, 2 October 2025 Venue: University of London, Senate House, Malet Street, London

RSVP: by Thursday the 18th of September via this link

Should you be able to attend, please register your details, including any dietary requirements, using the RSVP link above.

We hope you can join us for what promises to be a warm and memorable evening.

Warm regards,

[redacted]

Nous Group | Principal
d: [redacted] | m: [redacted] w: www.nousgroup.com

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Nous Group | A bigger idea of success

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From: [redacted] (VCO - Staff)
To: David Maguire (VCO - Staff); Louise Bohn (VCO - Staff)
Subject: FW: Are we part of the Uniform programme?
Date: 10 September 2025 14:55:39
Attachments: image001.png
image002.png
image003.png
image004.png
image005.png
image006.png
image007.png
image008.png

Dear David and Louise
Some input from Sally about information that Nous have shared about HE KPIs. Not sure this would necessarily change our view of paying to be Nous members (or Uniforum members) but sent to you for your information.

[redacted]
Registrar and Secretary
University of East Anglia, Norwich Research Park, Norwich, NR4 7TJ
Telephone: [redacted]
Mobile: +[redacted]
To contact my EA please email [redacted]@uea.ac.uk

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From: [redacted] VCO - Staff)

Fresh insights on university performance

CUC | Simon Lancaster and Phil Copestake | 10 September 2025

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Your Nous Group facilitators



[redacted]

FACILITATOR



[redacted]

FACILITATOR

SESSION AGENDA

Throughout this session we will explore:

A. Sector trends (the challenge is real)

B. The university response to date

C. What you're seeing in the sector – and beyond

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Nous is a global consultancy with deep expertise in Higher Education

Nous Group

Consulting Services

INSTITUTION AND FACULTY STRATEGY

We help universities to articulate and solve complex challenges.

ORGANISATIONAL AND SYSTEM PERFORMANCE

We develop the institutional infrastructure to deliver exceptional outcomes.

RESEARCH FOCUS AND PRODUCTIVITY

We support universities to build a research focus and the capability to drive performance and recognition.

EDUCATIONAL DIRECTION

We partner with institutions to optimise and refine what is offered, to whom and how.

CHANGE THROUGH PEOPLE

We provide expert guidance on transformation and develop people capability.

STUDENT EXPERIENCE

We help universities to craft an outstanding student experience that harnesses innovative ideas from across the globe.

Data Insights

PROFESSIONAL SERVICES BENCHMARKING

The UniForum membership programme allows universities to understand how professional services are resourced across the entire institution.

SERVICE EFFECTIVENESS ASSESSMENT

We provide leaders with a globally-calibrated and highly nuanced picture of service performance based on structured staff feedback.

TEACHING EFFORT ANALYTICS

We help universities better understand their teaching effort and the underlying drivers of this effort, to support decision making and workforce planning.

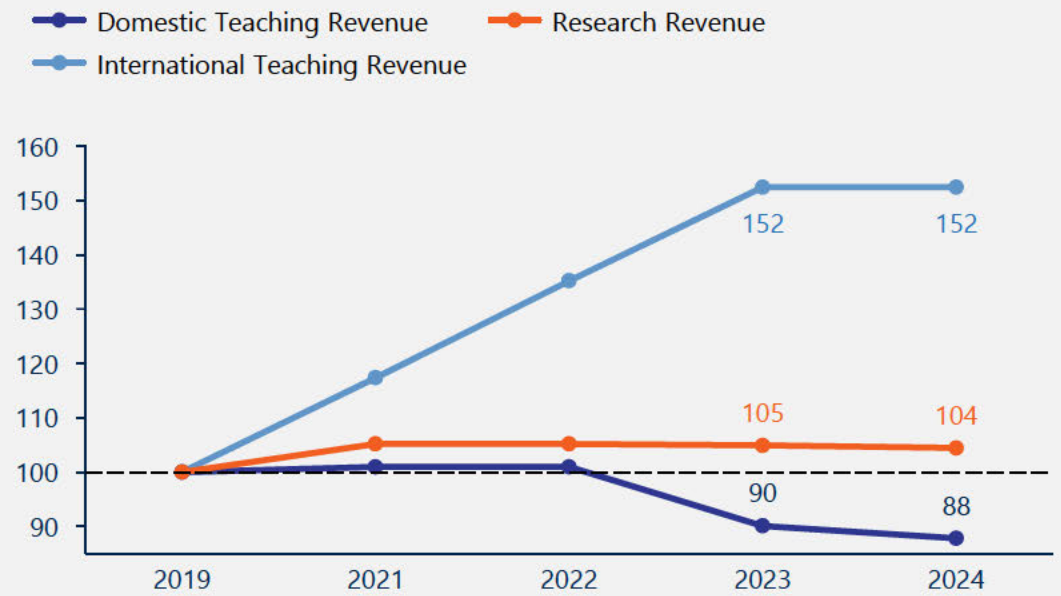
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A. Sector trends (the challenge is real)

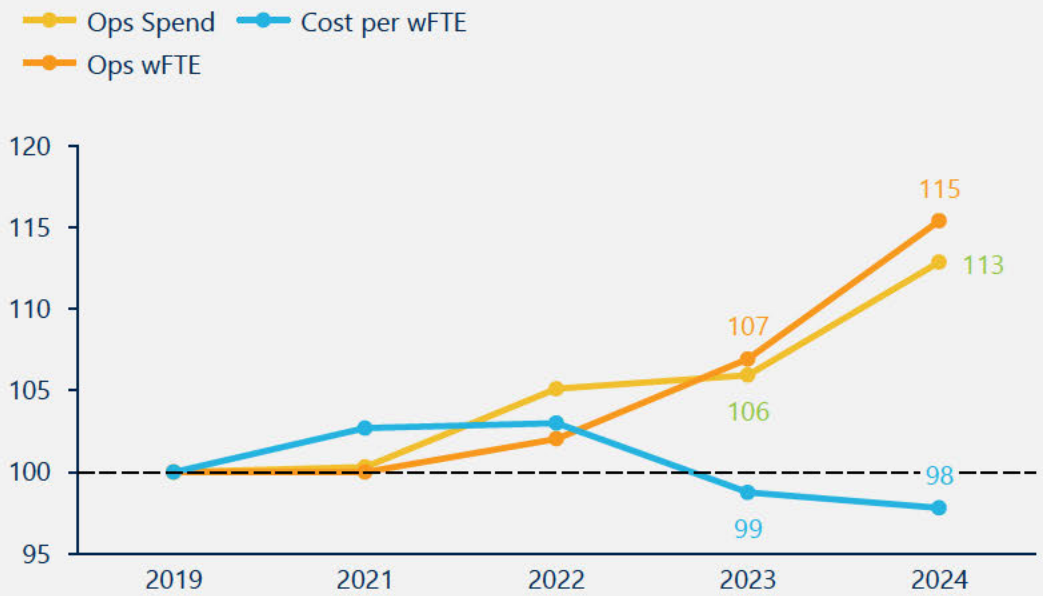
Flattening revenue and competition for students is set against steeply increasing resourcing, with a typical response being to pay less

UK REVENUE, COST AND CAPACITY TRENDS

UK REVENUE TRENDS (Intl, Dom, Res)



UK COST AND CAPACITY TRENDS (Ops Cost, wFTE and Cost per wFTE)

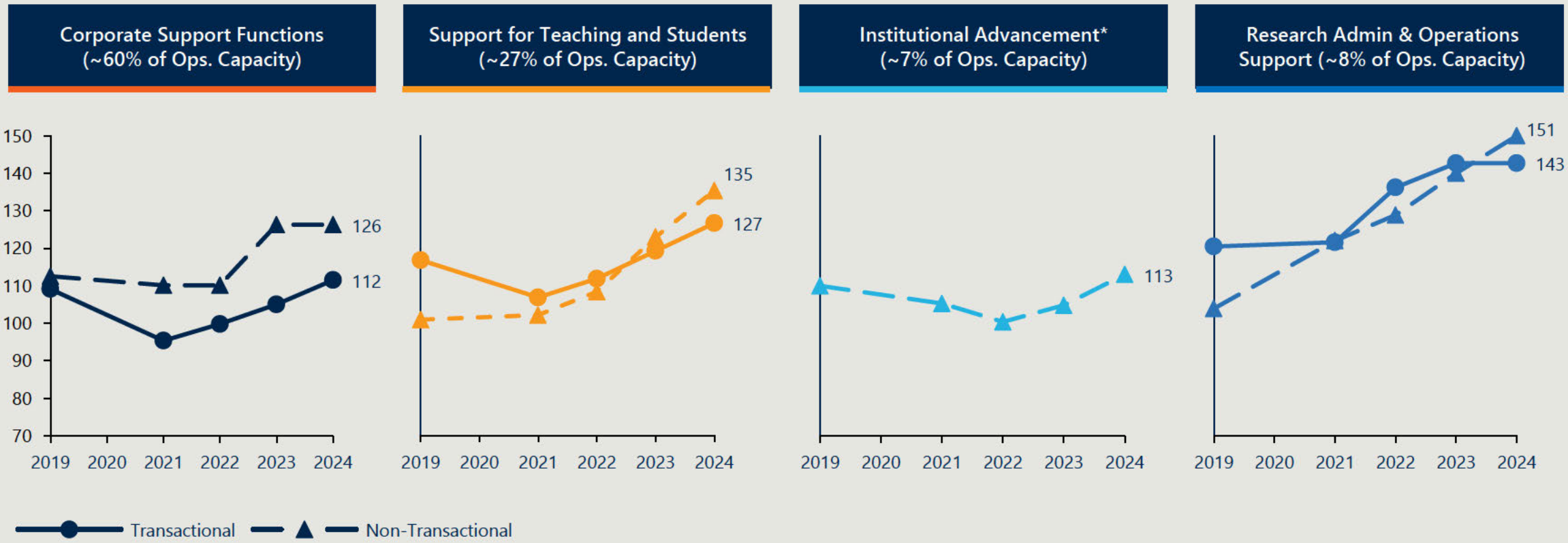


Inflation-adjusted medians, Index 2019 = 100

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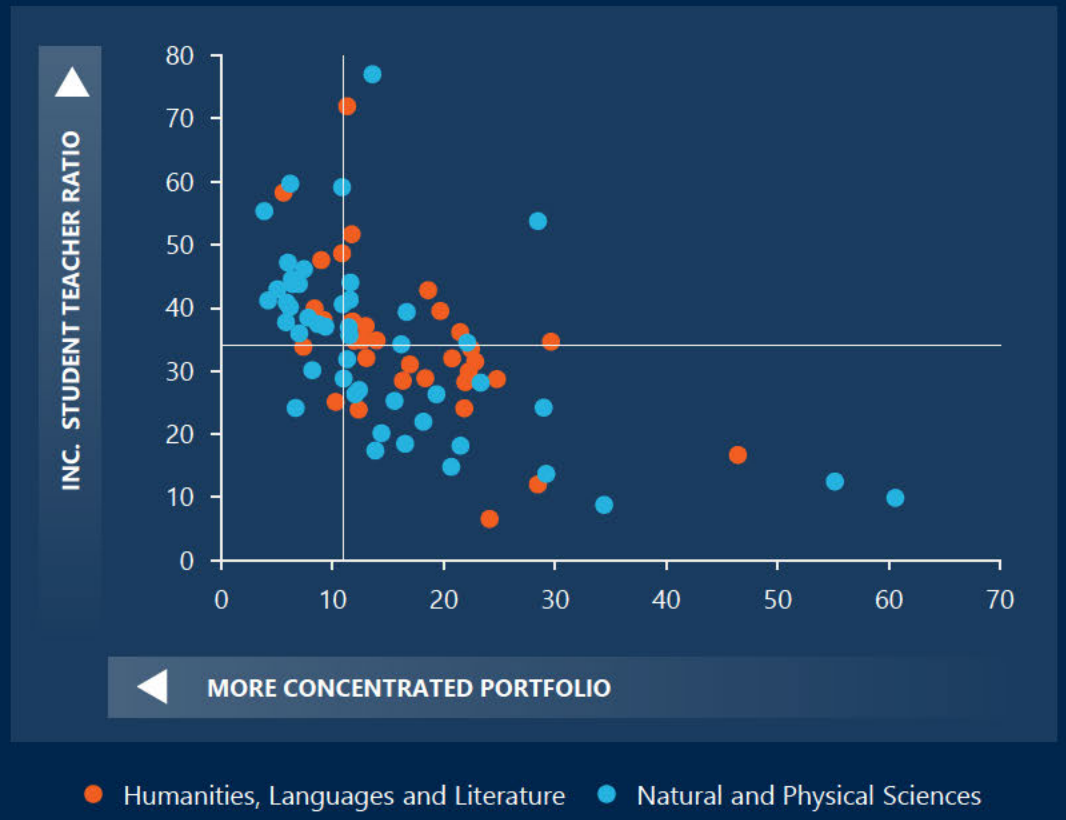
Professional services resourcing has been increasing steadily and widely but especially in teaching, student and research support

UK NORMALISED CAPACITY TRENDS - PORTFOLIO SEGMENTS



Whether your university's teaching portfolio is cohesive or fragmented will be the biggest driver of efficiency in deploying teaching capacity

PORTFOLIO CONCENTRATION VS TEACHING EFFORT



NEW INSIGHTS INTO TEACHING EFFICIENCY

In Nous's work with universities the significant impact of teaching design and delivery on whole-institution resourcing and performance has long been clear

2024 saw UniForum expand to include benchmarking of the efficiency and effectiveness of deployment of teaching capacity

The study reveals the extent to which things like workload allocation, teaching design and approach to assessment impacts effective teaching capacity use

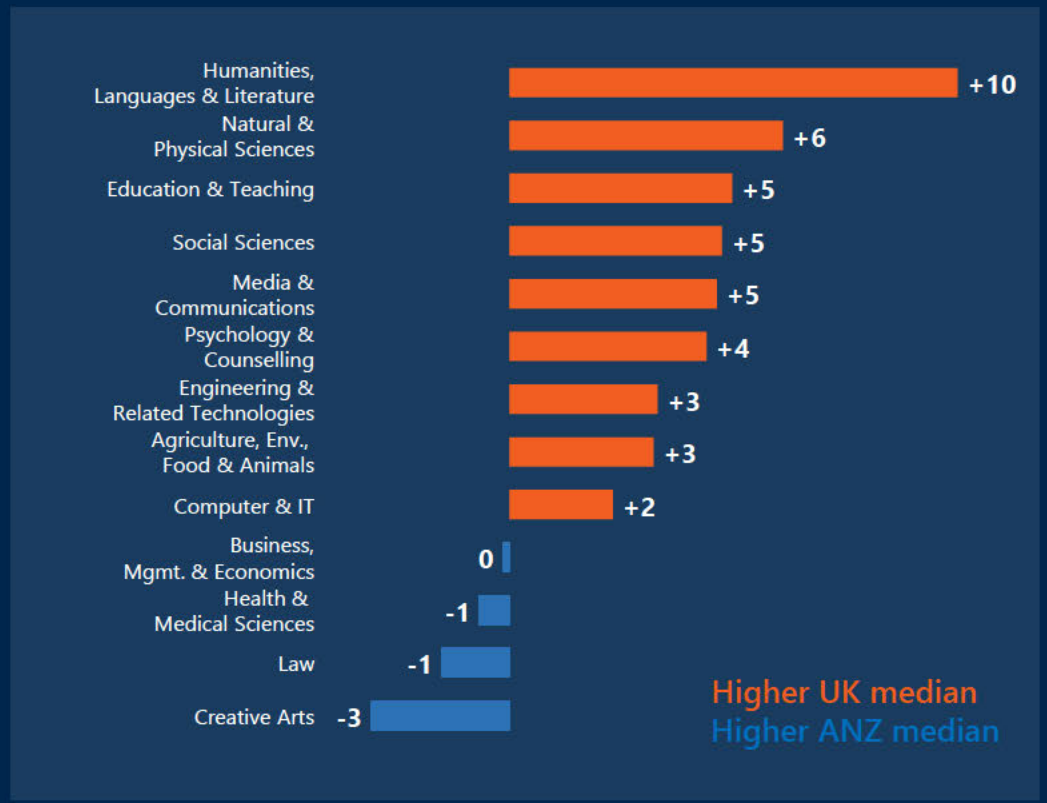
The biggest factor however is the extent to which the portfolio is concentrated or fragmented

Portfolio Concentration versus Student Teacher Ratio (Taught Student FTE per Teaching wFTE)

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UK universities deliver larger portfolios than Australian peers, making it harder for academics and doubling the cost of support services

PORTFOLIO CONCENTRATION: REGIONAL COMPARISON



UK UNIVERSITIES: MAKING IT HARD FOR THEMSELVES?

UK universities typically deliver more 'units of study' (modules) per student than ANZ universities

A fragmented portfolio is likely to create additional work (and administration) for academics – e.g. unit coordination, preparation, approvals, etc.

It will also create more work for professional staff – e.g. managing assessments, timetabling & academic programme administration

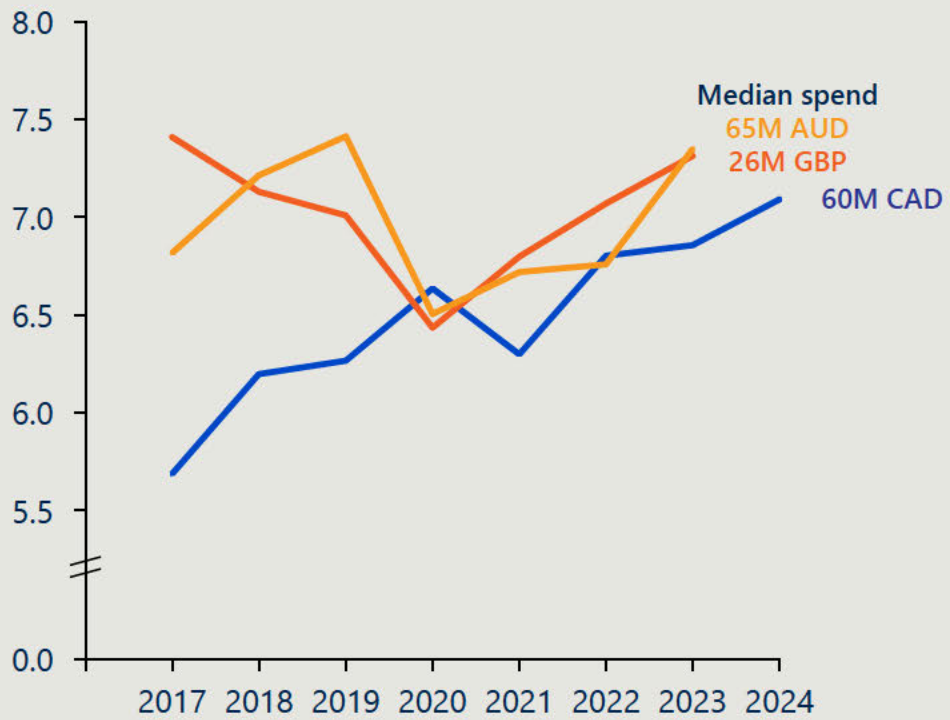
UK universities spend roughly 2-3 times the professional staff effort on teaching support activities than ANZ peers

Difference between UK and ANZ median Portfolio Concentration (# of units of study per 100 students)

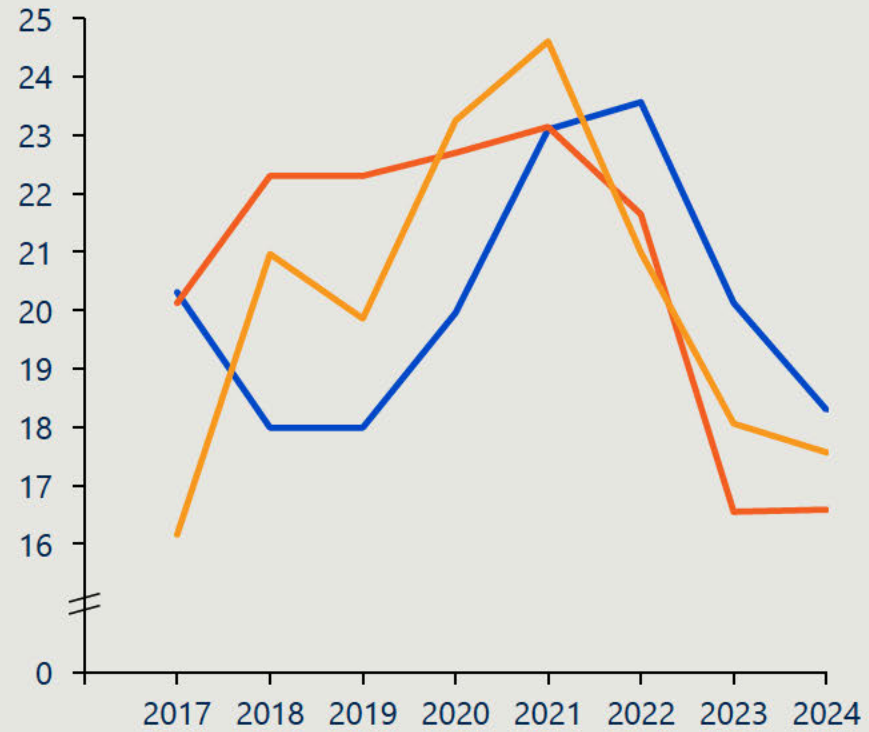
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Yet this additional resource does not result in higher levels of satisfaction with academic support services

MEDIAN SPEND ON SUPPORT FOR TEACHING AND STUDENTS AS % OF TEACHING REVENUE



MEDIAN NET STAFF SATISFACTION FOR SUPPORT FOR TEACHING AND STUDENTS

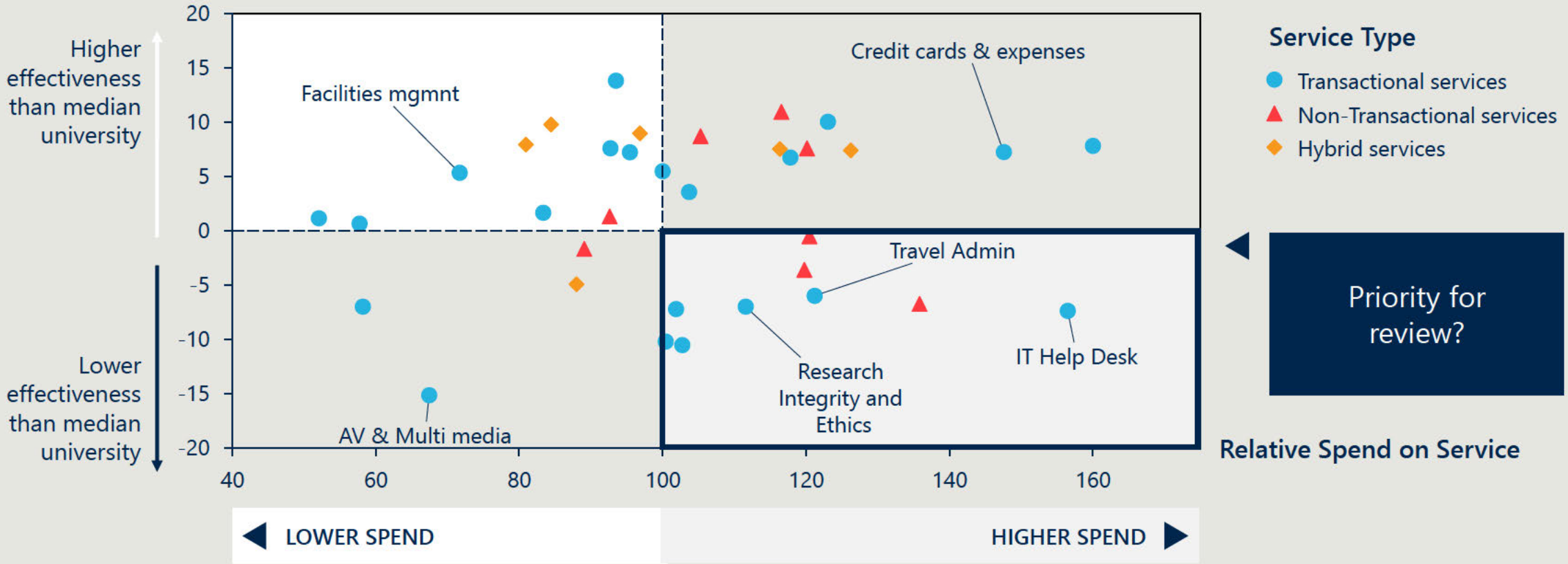


CAN UK & Ireland ANZ

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UniForum results give cause to question the logic of additional spend being the only way to improve service quality

RELATIVE EFFECTIVENESS RATINGS



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B. The university response to date

The environment immediately post-Covid bounce reinforced the growth mindset of UK universities

International student **growth accelerated** (until it didn't)

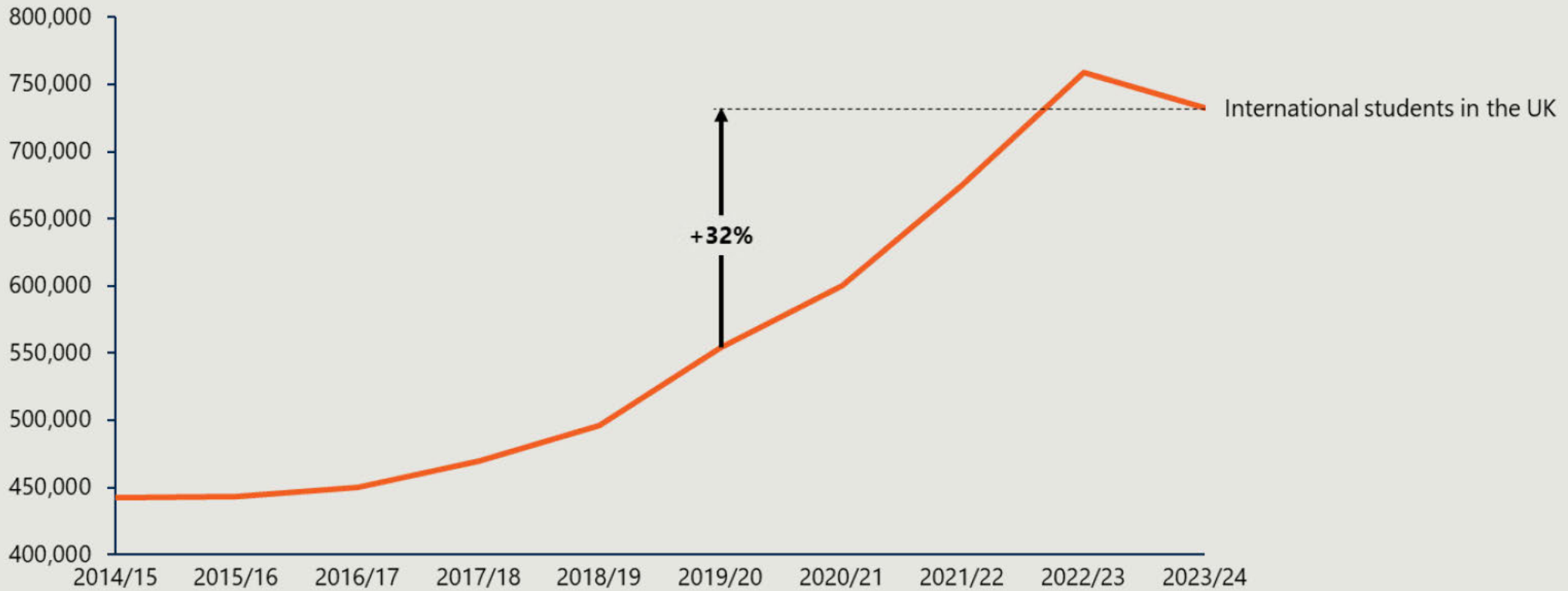
Universities responded to Covid growth by **employing more labour**, at lower cost

Benefits from growth were invested in **research and rankings growth** – or just staying in the black

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International student growth was strong and reliable for a long time

TEN-YEAR VIEW OF UK INTERNATIONAL STUDENT NUMBERS

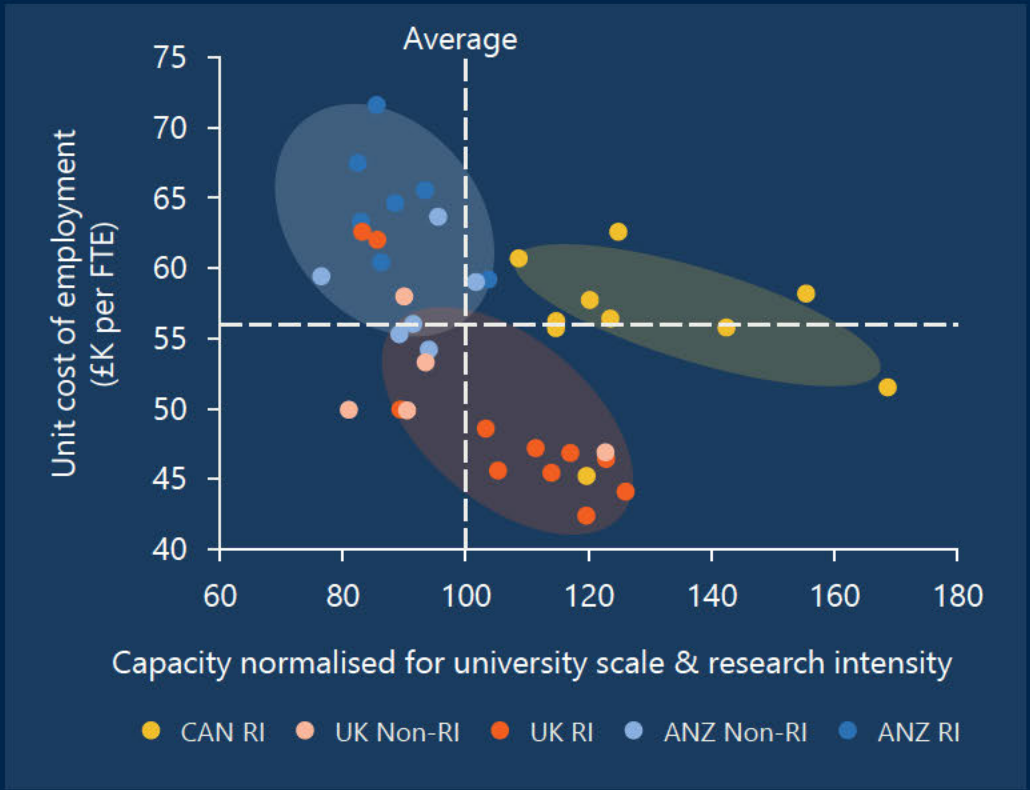


HESA, Table 21, Aggregate offshore students by HE provider, region of provision, provider country and region, level of study, type of activity and academic year; HESA, Table 46, HE student enrolments by CAH level 1 subject, CAH level 3 subject, level of study, mode of study, permanent address, sex and academic year

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The trend for UK universities to employ more professional staff at lower cost is a longstanding feature; Australian universities do the opposite

PROFESSIONAL STAFF CAPACITY AND EMPLOYMENT COST



THE RIGHT SHAPE OF WORKFORCE?

In all three regions, universities with a higher remunerated workforce employ less capacity

The mix of junior vs senior staff at a typical university is the same across each region

Are there consequences of UK universities employing at the lower end of the local labour market for the same junior/senior mix?

- Are they getting the professional talent needed?
- If not, are academics having to do more than their peers in the other regions?

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More recently, universities have been forced to shift gears

1

Corporate services 'salami slicing' has continued – but the trend for PS operating model reform has also accelerated

2

VS (and compulsory) schemes have become widespread

3

International shifted more focus to **TNE**

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CASE STUDY

This UK university has achieved rapid results in a short timeframe, lifting satisfaction and reducing cost via a service hub

CONTEXT

To help professional services keep pace with growth this university has successfully introduced a shared services hub for the most commonly-used staff services in IT, Finance and General Administration.

SOLUTION

Staff have come together under a single team to support codesign of new ways of working and continuous improvement. Services are now accessible more easily with a substantial self-serve element and clear performance management against a balanced scorecard.

The hub has been so successful that other corporate services are being added and the approach will be used as a template for a similar student services centre.

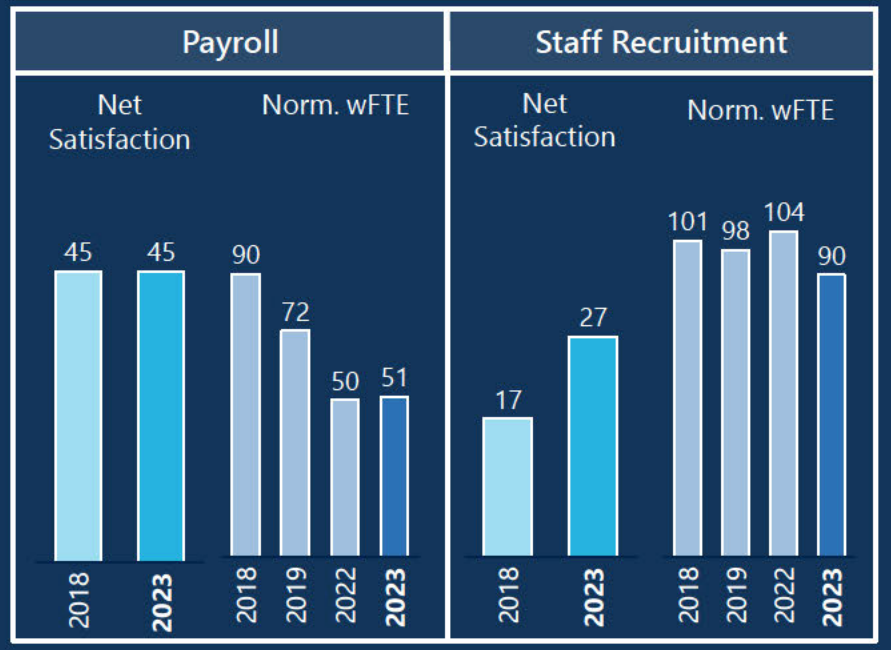
OUTCOMES

In HR alone the shared service centre is already delivering:

68% of Payroll and Benefits wFTE

41% of Staff Recruitment wFTE

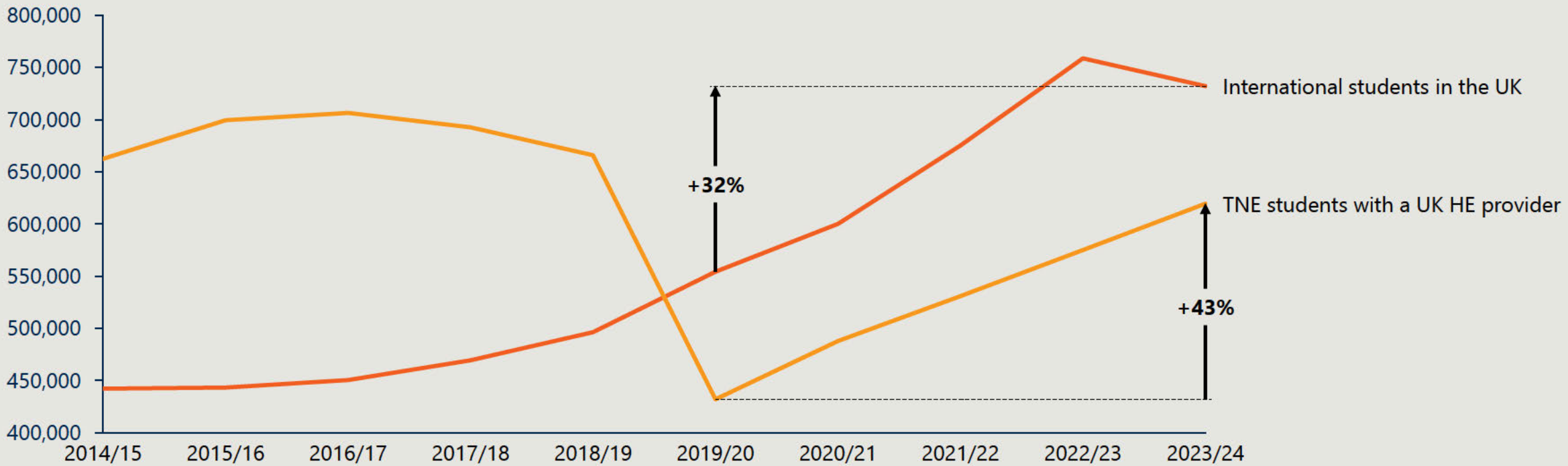
With fewer staff and similar or higher satisfaction:



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There is a renewed focus on Transnational education

TEN-YEAR VIEW OF UK INTERNATIONAL AND TNE STUDENT NUMBERS



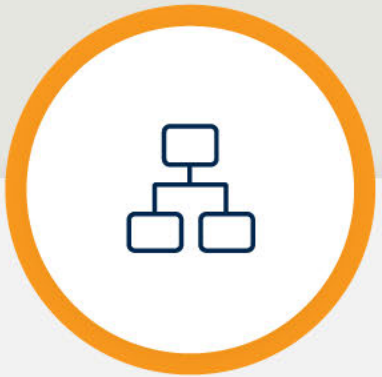
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But there are also key opportunities to reimagine the model



TECHNOLOGY (INCLUDING AI)



ACADEMIC MODEL



COLLABORATION AND SPECIALISATION

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1884


2023

AI requires universities to play both ‘defence’ and ‘offence’

	SHORT TERM		LONG TERM	
	DEFENCE	OFFENCE	DEFENCE	OFFENCE
TEACHING AND LEARNING	• Academic integrity • Equity and access	• Individualised study pathways • Curriculum evolution and personalisation	• Preparing students for the workforce of the future • Inclusive technology design	• Adaptive lifelong learning • Immersive pedagogy
RESEARCH AND INNOVATION	• Ethical adoption • Reputation management	• Research administration support • Discovery platforms	• Transparent AI-Supported Peer Review • Maintaining relevance of research	• Autonomous research platforms • Global leadership in AI
STUDENT EXPERIENCE	• Privacy safeguards • Preserve key human touchpoints	• Personalised student support • Proactive wellbeing monitoring	• Digital safety and wellbeing	• Holistic career services • Hyper-personalised student services
EXTERNAL ENGAGEMENT	• Compliance monitoring	• Targeted Industry Partnerships • Expert commentary on AI adoption	• Global policy advocacy	• AI-focused consortia
PROFESSIONAL SERVICES	• Workforce upskilling • Cybersecurity readiness	• Operational efficiency	• High-value human: human interactions • AI impact on future demand	• AI-transformed services • Decision support tools

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UK universities are increasing looking to reform their academic model to maintain mission sustainability.



WHAT WE TEACH	**Increase portfolio productivity** by teaching the right disciplines, programmes and modules
WHO TEACHES	**Increase teaching capacity** by focusing academics' time on teaching and shaping the workforce well
HOW WE DELIVER	**Increase teaching productivity** by applying new modes of delivery to maximise hours of learning per hour of teaching

A structured and holistic approach to a portfolio review helps support sensitive decision making

MARKET POSITION

Is the programme a competitive offer which targets a large pool of students?

PORTFOLIO ALIGNMENT

How well does the programme/module support a coherent overall university portfolio?



FINANCIAL PERFORMANCE

Does the programme/module contribute to a sustainable margin to the university?

STRATEGIC ALIGNMENT

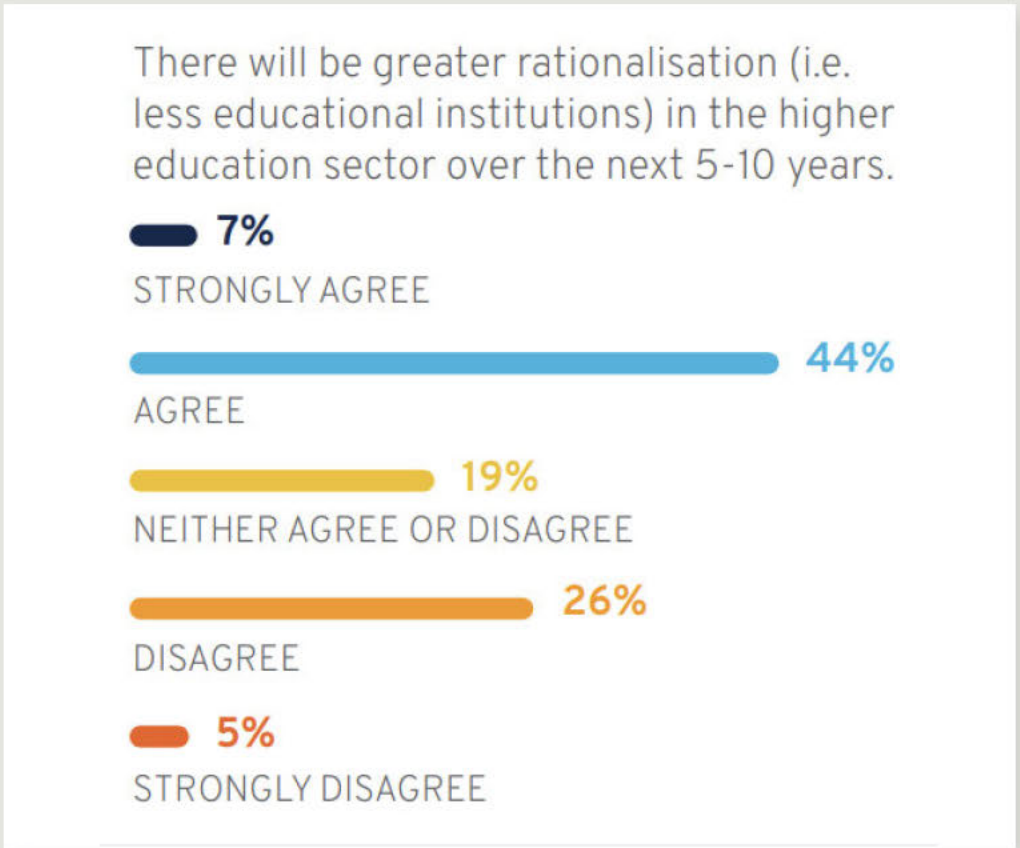
How closely aligned to the university's existing or aspirational areas of strength is the programme/module?

STUDENT VALUE

What are the likely graduate outcomes and do students find it enriching?

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Many university leaders see rationalisation ahead in the HE sector.



WHAT FORM MIGHT STRUCTURAL CHANGES TAKE?

- Joint ventures and partnerships?
- Shared services among autonomous institutions?
- Patchwork of ad hoc mergers?
  - Forced – financial distress?
  - Voluntary – strategic gain?

Or more radical options . . . ?

Source: Balancing Mission and Markets: the future of the HE offer – Nous Group, 2024

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C. What you're seeing in the sector – and beyond

What might effective responses look like?

1

As a Chair, what's one idea / intervention that you've been really impressed with – in your own, or another, university?

2

What's the most helpful approach from another sector that you think UK universities might adopt?

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Discussion

Thank you

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Contact details to continue the conversation





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SECTOR LEAD NOUS UK


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750
PEOPLE

9
OFFICES