**State of the nation | A changing wind from all directions**

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**Overview**

This thought piece explores eight current themes that will, over the coming twelve to eighteen months, continue to shape the business of Universities across the United Kingdom. Higher Education is truly at an intersection, that has undoubtedly been shaped through significant events over the last eighteen months, but some longer-term factors that have simply become accelerated and are now front and centre.

Pandora's box is well and truly open with combinations of tame and wicked problems and opportunities for the sector to realign itself with societal challenges and a congested regulatory environment. Our collective experiences over the last eighteen months, working alongside colleagues across other Universities and other sectors such as the NHS creates opportunity to do things differently and redefine our purpose and value within society.

*Policies and policy institutes*

The emergence of greater local authority decision making abilities, through Local Enterprise Partnerships are creating the case for a stronger local / regional identity and shaping future resource / capacity requirements. How do Universities ensure they continue to have '*a seat at the table*' with increasing developments at regional level?

An example is the creation of 42 Integrated Care Systems (ICS) across England, which goes well beyond earlier examples of connecting various aspects of a system together. Population based needs analysis have been on the horizon for some time, however the drive towards the ICSs will become a legal / statutory entity from 2022, shifting the focus of education and clinical purchasing, quality of service provision and outcomes into one connected area of decision making. The ICS Design Framework promotes the creation of '*Partnership Boards'* across the regions that the ICS serves, however there is no specific

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mention of the input of Universities within the document, rather a reference to '*education providers*'.

The post-16 skills for jobs white paper / bill is gathering momentum and is there a risk of a potential 'flash point' of artificial conflict between vocational and academic skills and learning and how will Further Education and Higher Educate work effectively in the future? Undoubtedly more resources will be fed into the Further Education environment, linking with the post-16 skills for jobs white paper / bill, however criticisms of the post-16 skills for jobs bill in terms of the requirement for further development and contextualisation (WonkHE, 2021).

The emergence of policy organisations such as the University Alliance Group, Universities UK, Council of Deans of Health and latterly WonkHE over the last ten years and especially during the current Covid-19 pandemic has reset the conversation and priority setting for Universities.  Addressing the requirements of the Office for Students and various metrics has, for many Universities influenced the shape and profile going forward.  How does the Higher Education sector's response to '*opportunity'* and '*threat'* align with the mission / values of Universities?  Will there be a wider call by Government to bring together Government agency across the education sector, such as the Office for Students, ESFA, Institute for Apprenticeships, Quality Assurance Agency etc?

*Economic*

The Covid-19 pandemic has left a number of Universities in an uncertain state financially and having to draw upon reserves.  Under the Office for Students regulations, Universities have to provide a suitable alternative route to graduation for their students should that institute become insolvent.  A number of Universities are attempting to diversifying their offer, switching to '*higher value subject areas*' with the anticipation of securing supplementary funding from future block contracts should the expected baseline fee reductions come into play as an output of the [Augar Review](#).

The details of how the future post 16 / 18 FE and HE landscape will look may emerge in the autumn Comprehensive Spending Review.  What happens if fees are reduced to £7,500 (which is being proposed in various think tanks)? Will there be a STEM 'top up' for certain disciplines such as Science and Engineering?  But what about Arts, Creative and Humanities?  How do these factors play into the future position of a modern / post 92 / Technically orientated (but not exclusively) University?

The use of data analytics within the Higher Education sector has become crucial to business modelling and scenario planning.  Often referred to as '*war rooms'* in some sectors, having accurate and recent data on areas such as student demographics, retention /student engagement levels, staffing compendiums, competitor market insight analysis creates an opportunity to gather important data to either defend existing business or accelerate within a subject discipline.  Data is everywhere, 'data tells, but a story sells' and Universities will need to learn to balance the narrative associated with student/societal success and meeting key metrics that are public facing and often perceived as determining 'value for money'.

How Universities work alongside other Universities in the coming eighteen months will be a potential opportunity and/or a risk.  The term '*co-opertition'* is being shaped in other sectors and how students 'pick and choose' their future learning across a range of Universities will ultimately force a degree of integration across the further and higher education sector.  What

if employers value a degree from a non-regulated educational provider as they would from a regulated university? We would have reached a tipping point, a real moment of questioning.

The latest Student Academic Experience Survey (SAES) 2021, which is jointly published by AdvanceHE and the Higher Education Policy Unit (HEPI) highlighted that just one in four (27%) students felt they had received 'good' or 'very good' value for money as part of the academic experience at university this year. This figure was 39% for the previous year of the SAES survey and there is a strong desire by students to return to in-person learning at their university campus.  The top three highest factors influencing perceptions of poor value included:

1. Tuition fees – 59%
2. Volume of in-person contact hours – 47%
3. Opportunity to access in-person teaching – 42%

There is a debate to be had around how Universities are seen to offer value for money and how much students are able to access in-person taught sessions, which is then complemented with a solid digital offering.

*Socio-economical*

The levelling up agenda could be seen to be in potential direct conflict with the need for strong Graduate Outcomes, and this has been at the heart of Government  and policy debate for some time.  The true value of subject discipline such as Sociology and Philosophy in terms of capturing and using personal sociological challenges to develop student growth is also an area that is being debated, along with true value of some subject areas in society.

The 'Flourish programme' is a key example where WP students are supported across the Faculty of Health and Applied Sciences and we have the emergence of the WP advocates across a number of subject disciplines.  The creation of the UPP Student Futures Commission brings a focus back on Learning and Teaching, student experience and employability and further involves students in shaping the curricula and conversations around sensitive matters such as race, equality and connecting with local/regional communities.

Sustainability and International strategies: The pandemic has accelerated a recalibration of HEI's priorities on globalisation and its contribution to the global common good.  How Universities continue to work towards meeting the United Nations Sustainability Goals, along with local socio-economic challenges and opportunities with the risk of various direct access routes into higher education being re-routed to Further Education will be critical.  This could be seen as  a positive action for groups of potential learners from deprived / under representative communities and the role of Universities should focus on creating sustainable 'learning bridges' that contain 'guard rails' through access and participation plans.

There is a potential mismatch between an institutions KPI's around income and reach from international engagement, and the need for an ethical, non-colonised approach to internationalisation. The next iteration of international strategy will need to consider the benefits that global engagement can bring to local/regional communities, and how civic engagement activities can have a positive impact. Partnerships/TNE activity will need to view a partnership more holistically, based on how the partnership can achieve both

institutional goals across the domains of widening access to education, research and sustainability.

The need for inclusive digital experiences for staff and students will be important. Reconfiguring curricula to integrate virtual exchanges, collaborative online projects will become more commonplace.  There is a growing argument for less focus on '*global rankings'* as the focus moves towards making meaningful contribution and self-improvement.

China is set to become the world's biggest spender on R&D and the UK's most significant research partner.  Collaborations with China account for more than 20% of the UK's high impact research. Reliance on Chinese student tuition fees to subsidise research is becoming a risky strategy as China's continues to expand its own HE provisions in terms of quality and reach. Over the next decade, China is likely to consolidate its ambition to becoming a global destination of HE.  This, coupled with the COVID effect, and the decreasing value of an international degree in China will need careful navigation over the next decade. However, high quality, fruitful partnerships with China will be important in terms of research partnerships, and a significant proportion of students from China may still want study in the UK.

In terms of understanding the true value of apprenticeships and their role in developing greater social mobility, do the employers who have a significant apprenticeship levy fully understand the apprenticeship model and how to effectively maximise it?  How do employers link up with Universities / FE colleges for example?  The Engineering Professors Council produced a document titled 'Experience enhanced' which highlights the need for greater brokering skills by Universities to work in this particular space, which falls outside of the traditional UCAS recruitment cycle.

How will our future students want to learn and grow?  Generation (Gen) Z students are coming into HE in an unusual '*in-between time*' (Grant, 2021), where one system is fading and another maybe emerging.  This, according to Jonathan Grant in his book 'The New Power University' suggests that Gen Z will use their new power activism to navigate into a more humanitarian era with less focus on ideology.  Literature suggests that Gen Z are generally better behaved, safer and socially more active than their predecessors, however, are also more vulnerable with higher rates of depression, self-harm and suicide (Twenge 2017).

*Technological*

Is the technological focus within Universities down to the Covid-19 pandemic and generation Z learners, or something much wider and societal?  Undoubtedly the Office for Students 'Gravity Assist' report opens up a debate and a call for the 'six actions' to be adopted across any subject discipline. An Avalanche is Coming was published in 2013 and set out key recommendations for the HE sector in terms of the need to invest in infrastructure, staff, programmatic design and alternative ways of engaging with students as stakeholders and co-creators.

Connecting students and University staff through the digital and physical space will be key going forward, using appropriate combinations of personalised student learning and support with effective use of data analytics and scaffolded curricula design and assessment

approaches.  Creating programmes that can connect with other programmes/subject disciplines and a range of wider curricula activities.

The embedding of emerging and established technologies such as Augmented Reality, Virtual Reality, Simulated learning and assessment into classroom environment is re-evaluating how Universities use their physical space going forward.  Professional bodies and regulators across health disciplines are validating simulation time towards the overall hours of study for students within Universities, which is common practice across other parts of the world, namely the United States of America.

## _Legal_

The legal complexity of working within the higher education sector has multiple connection points throughout the University and the students' journey.  The Competition and Markets Authority are now rooted in the business model of higher education and the emergence of the Office for Students and OfSTED compliance is creating a congested space in terms of compliance and monitoring activity.

Freedom of Information requests and GDPR alongside what at times feels like a constant battle with the media and Government to demonstrate true value for money against a longitudinal data set in the form of Graduate Outcomes requires careful governance arrangements.  The flip side here is, if a non-regulated (as in TDAP) University comes along and delivers a degree that employers' value, equally, if not more, than a registered University, where does this leave traditional Universities?

Do the current configurations of Universities meet the needs of modern graduate outcomes? How accountable are our front-line lecturers and researchers in the modern world of compliance and legal frameworks?  Conversations around 'opportunity' and 'threat' risks are now common place within University boardrooms and form part of the strategy setting in terms of future new business development.

## _Pedagogical drive_

The New Power University will see a greater focus on co-creation, collaboration and '_students as experts_', much in the same way that the NHS seeks to use patients as experts. New academic models of practice are emerging, which sees approaches such as the flipped classroom, crowdsourcing, hackathons, lean  and  agile ways of learning and working becoming more visible across all subject disciplines.  However, there is a growing concern amongst academics that a 'digital dystopia' will be created if the appropriate sensibilities are not created.  How do practical based programmes maintain their currency and accountability to professional and regulatory bodies?

As the traditional boundaries between 'face to face' and 'on-line learning' begin to blur and maybe signal a move away from the binary language that the defines the business model of many Universities, perhaps we need to think about the true value of a personalised student journey  and how a future skill mix of the workforce is created.  Students as co-creators is nothing new, however how we truly engage our students and ensure our curricula and assessment methods really speaks to our future students will become even more important.

Answering societal problems through curricula design, evaluation and re-evaluation will create a stronger position for Universities within the cities and regions in which they reside.

The Subject Readiness Review that is now underway across many Universities, will give an opportunity for staff to view their programme/discipline through a range of metrics and quantitative narrative.  The future positioning of subject ready TEF is to be confirmed and the world of foundation degrees, degree apprenticeships and alternative routes into education are all being remapped through the [Post 16 Skills for Jobs technical education](#) white paper.

Roughly 80% of all graduate jobs require transferable skills, rather than purely discipline specific skills ([World Economic Forum, 2020](#)).  Given this statistic, what are the core requirements of our subject disciplines going forward? How are our subject disciplines meeting the future needs of employers?  Some examples of how particular subject areas are redefining their curricula, engagement and societal connections include:

| Subject Area / Programme | Disruptive space |
|---|---|
| Philosophy 2.0 | AI and Robotics / Ethics and decisions making and a thematic approach to the programme architecture. |
| Food Systems | Geo-politics/ food security / Geographic Information Systems (GIS) |
| Public Health Degree Apprenticeship | Health population needs / big data / societal changes |
| Health Technology | Hybrid workforce developments / AI / product design and commercial development |

The Government wants the money following the employers and this evident through recent papers such as the Post 16 Skills for Jobs and Post 18 University (Augar) Review.  There is a similarity here, with Government thinking in 2011 with the '[Students at the heart of the system'](#) white paper.

There is an emergence of formal credit recognition of micro credentials in Universities, linked to the post 16 skills for jobs agenda, which challenges the traditional route of credit gathering on programmes.  How this links with current metric measurements such as the NSS and the delivery of Access and Participation Plans remains to be seen.   The Government wants to see greater flexibility for learners in terms of how students can hop on and hop off, switch modes of learning, credit transfer etc.  Does this way of learning disrupt traditional models of academic delivery – Practice first then theory?

The avalanche has definitely come and gone and the fabric of curricula design is wide open for remapping and reimaging which brings us back to the role and value of a modern University.

*Equality (and Diversity)*

Our University is a Stonewall Champion and we are proud of this recognition.  However, as we move more into a space where our value is going to be measured by our ability to attract, retain and grow our own workforce, this will become more of an important value.

Marshall Ganz (2010) talks about developing a framework for social action, framed around the heart (narrative), the head (strategy) and the hands (action), which allows people within an organisation from different backgrounds, characteristics and roles to help solve problems.  Using this model will be key for Universities going forward. We are beginning to see the development of Targeted Operating Models, and bringing together teams that focus more on a personalised student experience.  This model is far removed from traditional academic models of practice, but how are all our staff across the University engaged in this new way of working to create the common purpose?

Closing the module, programme and degree award attainment for all students of ethnicity is essential work for many Universities.  Bringing together single sources of data that are accurate, developing meaningful awareness and training of staff and active inclusion of student advocates will foster a culture of change within the organisation.  How will we ensure everyone is on the same page in terms of their responsibility and actions going forward? How do we continue with the momentum going forward in terms of recruiting a diverse workforce, that truly reflects society? An increase in formative assessment feedback and meaningful use of data analytics will be required to inform engagement and move away from a deficit model with particular student groups.  How this is managed will be fundamental to success.

The emergence of new bills such as the Higher Education (Freedom of Speech) Bill and how this plays against the Equality Act and the a range of other important agendas such as Prevent, student hardship funding, Access and Prevention Plans will continue to surface over the coming months.  Students are entering Higher Education more informed than the previous generations and communication modes are instant and powerful.  The voice of the student as an activist, consumer, learner, champion, advocate and change agent is more prevalent now and will be in the coming years.  The societal impact of a student choosing to study at Universities will become more important to many of our learners.  This makes an interesting flip side (i.e. 'data tells, a story sells') to the whole financial salary measurements of the Graduate Outcomes Survey.   We need to hold onto and promote the successes of our graduates and our staff, these are the stories

 An organisational change in culture is required within Universities, linking the impact of Covid-19 and the workforce Kings Fund Report.  How does a workforce reflect, decompress and grow after the events of the last eighteen months?

How does a University create this model of '*access for all'* and recruitment across diverse groups, working with local communities and other organisations?  The '*Science for all'* programme (University of the West of England, Bristol) aligns the goal five (gender equality) of the United Nations Sustainability Goals with the Athena Swan charter mark and involves actively promoting women and other under represented groups within Science. Do we need a change of mindsets within Higher Education and a re-map of traditional roles, removing outdated hierarchies and perhaps a sense of entitlement across certain groups?

## _Research_

The outcome of REF21 will be with Universities by December 2021. The outcome of future funding from REF21 (Quality Research) will need to align with University research beacons but also current and emerging research strengths and workforce research profile. Creating tomorrow's researchers through home grown or incubator funding, whilst ensuring our research centres continue to push the boundaries and connect with relevant partners will be key. The emergence of mRNA (Messenger RNA) for example, has propelled biotechnology to the centre stage and the future research fields post Covid-19 pandemic could draw upon alternative and new funding routes through UKRI.

The move towards translational research has become more prevalent in the recent REF21, compared with the previous two exercises. Multi-organisational and professional working will become more critical moving forward, where funding bodies will demand social impact measurements from funded research. Some subject disciplines are well versed in demonstrating research impact, others will require some remapping.

The emergence of open access research resources and ways to create funding through crowdsourcing and the power of 'citizen science' will see a shift in the traditional understanding of subject expertise. What does this mean for those who are currently the subject experts within the University and how do we use platforms such as the Academic Health Science Networks / Centres and other core fundamental environments to attract future external funding?

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