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Our Journey Towards World Class
Leading Transformational Strategic Change

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This paper presents a case study on the development and implementation of institutional strategy within a large, leading research intensive, UK University. The strategy process has been approached in a way that uses the University’s international reputation and ranking, alongside its core values and purpose to create a strong platform for change; delivering a World Class institution.

Informed by international best practice, the approach has been recognised internationally as leading edge. The University has used a “strategy map” to provide a framework which links the University’s aspirations in terms of societal impacts (purpose) and reputation and position (vision) to objectives, measures and themes to achieve these strategic outcomes.

The approach incorporates the use of measures to assess each of the strategic outcomes across all parts of the University, enabling academic leaders to balance priorities. The case study highlights the importance of balancing the academic community’s acceptance of the vision with the mechanisms for assessing progress.

The case study provides a useful insight into how to affect change in a large successful institution improving the quality, reputation and impact it provides. The University is making significant progress in affecting a substantive strategic change programme. The paper explores the key elements and themes within this programme ranging from leadership, communication and alignment to cascading key measures of progress, and embedding institutional strategy throughout the academic community. The paper concludes with a number of lessons learned that will be relevant to any HEI looking to affect significant strategic change.

University of Leeds – Introduction and Strategic Context

The University of Leeds is the second largest University in the UK, with a vibrant academic community comprising over 30,000 students, 8,000 staff and 250,000 graduates. It is a prestigious institution, having been a significant player at the forefront of UK higher education for over 100 years. The University’s reputation is built upon the volume, breadth and quality of its research and education, combining one of the largest student populations with a diverse portfolio of research excellence. It is a member of the Russell Group (of research intensive universities) and a founder member of the successful White Rose University consortium and the Worldwide Universities Network.

In September 2003 Professor Michael Arthur was appointed as new the Vice-Chancellor, his appointment and leadership were pivotal in the University assessing its current position and long term strategic vision and aspirations. Prior to Professor Arthur’s arrival, the University had gone through a period of unprecedented growth in student numbers (predominantly in UK undergraduates); as the University responded to threats and opportunities arising from changes in UK government policy. This growth coincided with a period of reduction of the unit of resource (funding per student), putting real pressure upon the ability to deliver quality and volume across both education and research missions.

The growth of the institution in this period was effectively a slow “mission-drift” for the University; it was not part of an explicit shared strategy, and was starting to seriously undermine the University’s capacity for delivering the published strategic plan. Significantly,
this mission drift was starting to create a “fault-line” right at the heart of the academic activities, creating divisions and tensions between delivering excellent research and excellent education. Consequently the university community lacked confidence and was confused about direction and priorities. Benchmark comparisons with other Russell Group (and the smaller niche 94 group) demonstrated this position – close to the largest in terms of student numbers with a large but declining research income; operating at a lower research intensity than most of the University’s peers.

The new Vice-Chancellor’s leadership was critical in developing a vision for the University, and raising the importance of a clearly articulated strategy with strong ownership throughout the University. One of the key challenges for this strategy was to align the priorities and objectives of all the corporate services and all of the faculties, schools and academic departments. In the absence of an agreed over-riding strategy, each area had interpreted and responded to changes and opportunities and threats in the external landscape differently; with allocation of funding (based upon student numbers, research income and research assessment exercise income) driving behaviours and responses. This bottom up emergent interpretation of strategy was set in academic areas by Heads who rotated on a three year basis. This approach to strategy produced an “averaging out” effect at a corporate level, working against any movement from the assumed current position. At that point financial controls and reporting processes were the most dominant linkage between the University (corporate) and the constituent academic units, enacted through a laissez-faire/interventional style of management, largely allowing academic units complete freedom unless financial performance weakened, then relying on interventions to resolve issues.

This devolved approach to management is not uncommon in the Higher Education sector – “universities function adequately enough when everyone is left to their own devices. Incompetent management seems not to matter, the ship goes on sailing. The trouble comes when drastic change is needed.” (Kellaway, 2006). In a relatively stable environment with strong local academic management and limited expectations for exceptional growth the inherent weakness in this approach remained hidden. However, for the University of Leeds this was an extremely risky position to be in during a period of considerable change and fierce competition. The size and the scale of activities across research and education missions left the University very vulnerable to a gradual decline in competitive position compared to institutions with more focussed portfolios and ability to respond rapidly. The challenge for the new leadership was about being able to bring a sense of urgency, strategy and focus to such a large organisation that had not recognised the slow decline that was happening. This sat alongside the challenge of convincing heads who had significant autonomy and freedom of the corporate focus and alignment, in a culture that values creativity and independence.

It is well recognised that there are high risks associated with the execution (rather than development) of strategy. These risks are amplified when dealing with the execution of strategy in the University sector; where strategies and change are notoriously difficult to implement due to cultural, leadership, diversity, scale and governance factors.

University of Leeds approach to strategy development and implementation

The University of Leeds adopted the Balanced Scorecard Methodology as the vehicle for the development and execution of its corporate strategy (Donoghue, 2007). This approach is well documented with a wide number of companies across a breadth of sectors reporting improved results from implementation (Kaplan and Norton, 1996; 2000; 2004; 2006; 2008).
The companies reporting significant improvement have adopted and implemented five principles of strategy execution in the areas of leadership, strategy development, alignment, communication and governance (See figure 1).

**Figure 1:** Principles of the Strategy Focused Organisation (Kaplan and Norton; 2000)

2. TRANSLATE STRATEGY TO OPERATIONAL TERMS

3. ALIGN THE ORGANISATION TO THE STRATEGY

4. MOTIVATE TO MAKE STRATEGY EVERYONE’S JOB

5. GOVERN TO MAKE STRATEGY A CONTINUAL PROCESS

Examples of successful implementation within complex large higher education institutions were however very few, the majority of “best practice” examples being found largely with private sector large scale high volume service and product environments (spanning process manufacturing, discrete manufacturing, consumer products and services, financial services and telecommunications). A balanced scorecard and strategy map are the centre of this approach, providing a clear and simple way of representing strategy organised into key strategic themes (based upon four perspectives of finance, learning and growth, key process and customers) decomposed into objectives, measures, targets and initiatives. The methodology provided a good fit with how the University wanted to approach strategy; being able to represent the strategy clearly on a single page so that it could be widely understood and communicated. The methodology provided a way of effectively linking the long term vision statement with the objectives, measures and initiatives to achieve this vision (Cascade).

The strategy map and scorecard approach are underpinned by the principles of performance measurement. When defined correctly, the strategy map is supported by a balanced (balancing all key perspectives) scorecard of measures that enable an organisation to define and monitor strategic performance. A well constructed scorecard will enable an executive to link operational activities to strategic outcomes, and perhaps the most significant element, to develop an understanding of the cause and effect drivers that effect strategy. This point is frequently missed and leads many organisations to become “frustrated” when the hypothesis they have assumed is not validated (Neely and Najjar, 2006).

The scorecard can be an extremely powerful tool, for helping to define key outcomes that affect strategy, to reinforce accountability and ownership and to enable organisational learning and evaluation to take place. There are however many examples where scorecards have created a focus on the wrong activities, often because they are too operational and not
linked to strategic outcomes, but also because of the distorting effect and perverse behaviours incentivised targets can create, with many recent examples around targets used to report performance at a corporate level. Following their extensive review of Performance Monitoring practice the Royal Statistical Society Working Party on Performance Monitoring in the Public Services, argue that Performance monitoring done well is broadly productive for those concerned. Done badly, it can be very costly and not merely ineffective but harmful and indeed destructive (Royal Statistical Society, 2003).

The UK higher education sector has until recent times enjoyed relative stability and consequently strategies have typically focussed on alignment and resource planning rather than significant change. The last decade has seen a considerable increase in competition for funding and students, major policy changes, with significant changes in the positioning of institutions operating in further and higher education; and vocational and academic provision. One of the key challenges has been establishing the relevance and credibility of strategy and transformational change; which has to counter often deeply rooted beliefs about institutional sustainability being guaranteed.

For the University of Leeds, our reputation and profile made this challenge harder; as a great institution we had to demonstrate the vulnerability of our current position, alongside the importance and achievability of our vision. Staff were not going to engage in a strategy unless its credibility and relevance could be clearly established. To achieve this we used a variety of internal and external measures of performance reputation and ranking to clearly articulate the current position and the vision. It was very important that a variety of measures were used to build a “rounded” picture using both qualitative and quantitative measures. There are a number of useful external sources including league tables (THES, Times UK, Guardian), research council league tables of income, national student survey data, application data, HESA returns, RAE – which were all used to support our overall analysis and demonstrate our position over time and against our peers. Internal data was also key to illustrate trends, and to demonstrate performance against peers within more specific subject groupings. Most of these data sources have credibility issues when taken individually – due to the choice of weightings, comparators or timing; but overall they provided the credible and powerful picture we needed.

Fundamental to the development and implementation of the strategy was the development and communication of the University’s vision which as well as reflecting its aspirations and reflecting the gaps identified by the performance data also needed credibility and relevance. Considerable time and effort was dedicated to developing the vision of:

“By 2015 our distinctive ability to integrate world-class research, scholarship and education will have secured us a place among the top 50 universities in the world”

Clearly this vision directly relates our performance to an overall world position, and while league tables provide an important reference point and stimulus for improvement, the focus is not linked to a single league table. Rather monitoring progress is based on the broad set of measures in the scorecard, with use of external benchmark data for comparison. As well as providing a statement that resonates throughout the institution, Kaplan and Norton (2008) highlight further attribute of the University’s vision:

It contains each of three critical components:

• Stretch Goal: To be ranked among the top fifty universities
• **Definition of niche**: To integrate world-class research, scholarship, and education

• **Time Horizon**: By 2015

_The stretch goal in the vision statement should be different from the company’s [sic] current position. It’s important to be ambitious in setting the company’s goals and the CEO must take the lead. Indeed, one of the principal roles of an effective leader is to create a sense of urgency and formulate a target that challenges all employees, even in a well performing organization, to become much better. Without strong leadership, an organization becomes complacent and, at best, achieves incremental improvement from the status quo. (Kaplan and Norton, 2008, pp. 41)_

The development, consultation and articulation of the vision were critical stages in the strategy process. The vision, alongside the values, acted as the single memorable focal point for every element of the strategy implementation. It was imperative that the University’s vision was “meaningful, measurable and scalable.” The University worked very hard to ensure that the vision was “meaningful” and would win the hearts and minds of a significant proportion of the workforce, whilst also having credibility and relevance to key external stakeholders. This was built around the concepts of “world-class” and the “integration of education and research”; both of these themes emerging as focal points for the communication and dialogue with staff.

Considerable effort was put into bringing these concepts to life; discussing what a truly “world-class” university would feel like in every aspect of university life, and exploring the benefits and challenges of creating deep synergy between education and research. Establishing how to “measure” progress was on the face of it relatively straightforward with league tables offering indications of our world standing. There was however a very real danger that issues with the credibility and reliability of these tables could undermine the meaningfulness of the vision. The university positioned the “top-50” aspiration as something that would be reflected through league table standings, whilst being very clear that achieving this would be a reflection of our success rather than a strategy in its own right. Whilst subtle, this was very important; since it would have been very easy to have prioritised a number of short term actions to yield increased scores on elements of the league tables rather than focussing on building a sustainable world class institution. The scalability of the vision was linked to its simplicity – and the ability to unpack, interpret and calibrate “world-class” and “integration of research and education” at every level of the University and across all functions. This was further enabled using the strategy map (see Figure 2), which spoke to the whole organisation and enabled all parts to position their contribution and priorities in the context of the vision.
Figure 2: University of Leeds Strategy Map (University of Leeds Strategic Plan - www.leeds.ac.uk/strategy)

Leadership

Leadership is one of the key components in the whole approach; his has been critical to the success of the approach so far, and will continue to be a “pace-setting” factor going forward. The implementation of strategy in any large complex organisation is dependent upon a well developed effective base of distributed leadership, providing the capability to interpret the strategy to set priorities and direction that aligns with the overall vision. The University shares the challenge of “leadership development” with the rest of the higher education sector in the UK. Significant developments have been made in recent years in raising the understanding, profile and acceptance of the importance of academic leadership. For the University of Leeds, this challenge is about valuing leadership, developing leadership capacity, creating a leadership community and empowering leadership. Developing leadership capacity was one of the key priorities in the strategy, primarily focussing on building a critical mass of academic leaders with the experience, skills and capacity to undertake leadership roles. This couldn’t have been achieved without a shift in the way the University community valued leadership – creating a landscape that encouraged exceptional people to want to
contribute. However, perhaps the most important development was ensuring that the culture and structures have shifted to enable the space and autonomy to enact this leadership. Matching the “organisational development” through building leadership communities, building commitment and conversation around the strategy and developing consensus has provided the environment to enable a transformation in the culture of the organisation. This is a challenging journey, particularly when moving from a well managed centralised organisation with solid strong performance, devolving and distributing leadership during considerable transition and development. One of the key observations has been recognising the pace of the transformation is directly linked to the pace of leadership development; in effect the transformational change process is identical to the organisational development.

**Strategy Development**

The whole strategy development process was undertaken using a team-based consultative style, working with the vision as the overarching aim to construct a strategy map articulating how to achieve this vision. The “journey” was as important as the outcome, resulting in a university strategy that had been informed by a large number of stakeholders and through this process had improved both the strategy and the ownership of it. Previous strategies had largely been positioned as “plans” – their key value to coordinate and integrate student number, research and finance projections and to report this to the funding council. The new strategy was positioned as a “manifesto” for change – hence the strategy map style was useful in conveying a very different purpose for the document. The strategy map format allowed the key messages and direction to be communicated using a relatively simple, accessible front page, whilst providing the framework for further detail about measures, definitions and actions to support this high level overview. The University deliberately chose to just produce one strategy map for the whole organisation; because it needed to create a vision and direction that united the whole organisation.

**Alignment**

For such a large and diverse organisation, alignment is a considerable challenge. The concept of alignment does not sit easily alongside the values of academic freedom and independence, and needed to be carefully managed to ensure the benefits of strategic focus and alignment did not produce unintended reactions and consequences. The University used several approaches to build a considered and intelligent alignment with the strategy. A key theme throughout all of these mechanisms was the importance of “leadership” at the centre of the process. Theme teams were established to provide the strategic oversight and leadership for several of the cross cutting strategic themes. These teams provided the focal point for a whole section of the strategy – sponsoring initiatives, maintaining an overview of progress and coordinating activity throughout the University. The themes role spanned the traditional structures of the University – helping to provide horizontal alignment. The theme teams maintained an overview that spanned both the performance and alignment of “business as usual” activities (using the scorecard) and responsibility for transformational change. Several university wide initiatives were managed by the theme teams – with a focus on delivering outcomes that would transform the performance of the University. The themes worked alongside the more traditional “vertical structures” – where the strategy cascaded through line management accountability. A more traditional planning process was used to provide the reference for alignment – linking priorities and plans to the University strategy. High quality evidence based scorecards underpinned these planning processes, enabling individual parts of the organisation to view their direction and performance in relation to the University’s strategy.
Communication

A massive campaign of communication was undertaken to ensure that everyone within the University was aware of the strategy. This programme is still ongoing, moving from an initial focus on creating high levels of awareness and understanding of the University strategy to understanding, ownership and engagement to what this means locally. Key activities early in the programme included large scale presentation and broadcasts, a comprehensive website and campaigns of local engagement. The tone of the communication was very important in order to reinforce the values and build more than just an understanding – winning hearts and minds was critical for the University. To achieve this, the communication was supported locally using local advocates and voices, with the role of the communications team being largely in the background. By putting strategy into the “voice” of the staff the University was able to convey and interpret the key priorities in a way that could have never been achieved otherwise.

Governance

The final principle of the balanced scorecard approach revolves around establishing an effective governance framework to oversee strategy progress. The University’s governance of strategy is based upon four elements that combine to provide both a long term and short term picture of progress, position and issues. The components that integrate are; a regular strategy overview meeting that considers the whole map and takes a high level evidence based overview of progress, annual in depth theme reviews to take a deeper look at progress and strategy within the theme, faculty and service reviews to look at vertical alignment- reviewing progress and performance and an annual overall and deeper consideration of strategy. The culture and style of all of these processes is about a leadership conversation of the issues informed by high quality evidence based information; with clarity of the distinction between performance gaps (underperformance) and opportunity gaps (not at world class levels of performance).

The challenge of delivering transformational change to improve performance, reputation, ranking and quality.

The case study illustrates how transformational change can occur, even in a very large complex successful organisation not facing immediate risks of strategic and competitive failure. In the absence of a single “burning platform” establishing a clear mandate for change and transformation is not easy. It is made even harder within the University’s cultural context; one that is comfortable challenging everything and accepting nothing on face value. The university was essentially faced with the challenge of operating and competing in a new competitive and market environment, requiring higher levels of performance, impact and innovation in order to maintain its current position. The change in the competitive and market environment was set to continue and intensify, requiring a sustainable rather than step change response. The strategy map process enabled this sustainable response, embedding strategic management as a core competency for the University.

The framework in Figure 3 provides an outline of the “layers” of strategy management that were developed in order to create this sustainable and aligned strategy. The experience at the University of Leeds illustrates the importance of aligning every layer (Outcomes, Strategy, Measures, Implementation, Ownership) of this framework; with every layer directly supporting the transformational change agenda. The emphasis of this alignment was about supporting the strategic change agenda to transform the University to be a truly world-class
University. Hence each and every layer reinforced the direction and importance of the change agenda, focussing attention upon performance and opportunity gaps to achieve our strategy. The “alignment” agenda was not about creating a narrow convergence and restricting academic creativity and intellectual independence; the core aim was to move from a culture, norm, values, structure and style that supported stability during a period of steady growth with limited change; to building a capability and capacity for agility, flexibility and strategic change.

It took the University around two to three years to get to a position where this alignment occurred, essentially the tipping point in our strategy process. At this point we had developed and articulated the case for change with a consistent interpretation, understanding and representation at all levels. This is the point where strategy management had become embedded into the way our organisation operates. In the absence of a single big external threat this was difficult to achieve. Our challenge was to find a way of embedding strategy in a way that would irreversibly affect the pace of change throughout the university, providing us with a sustainable strategy execution capability.

Figure 3: Sustainable & Aligned Strategy

The “outcomes and impact” layer provides the reference point for linking the institution’s objectives to the reputational, league table and external expectations placed upon the University. Whilst the institution had considerable choice over its own strategy, it has little choice about how its outcomes and impacts are evaluated by external stakeholders. Hence a University’s choice of strategy will enable it to focus upon particular groups on stakeholders and outcomes as part of the choice of mission, but the way in which these outcomes are considered is largely not something the institution can influence. Increasingly University’s are subject to increasing measurement of outcomes and impact; which helps provide external factors to drive improvements (particularly when linked to reputation and funding). One of the challenges in integrating internal strategy with this layer is about ensuring a sense of strategy and direction pervades the organisation, and is not lost in responding to multiple external measures. Hence the way in which external measures are prioritised and positioned can have a big effect on internal strategies.
The case study illustrates that importance of creating an alignment and linkage between the high level outcomes and impact a University is trying to achieve with the individual actions and behaviours of staff on a day to day basis. The University of Leeds has been successful in using a comprehensive institutional strategy to achieve this alignment, and is using this to achieve considerable impact and reputation. The alignment is reinforced through a series of layers – using the principles of strategy management as described in the paper. Leadership, communication, governance, strategy and alignment mechanisms are key to ensuring the success of this.

Conclusions, observations and discussion

As has been noted, whilst there are many well defined strategies, many fall down at the implementation stage. The case study has demonstrated that principles of the Strategy Focused Organisation, including the scorecard and strategy map tools, provided a valuable approach to the development, implementation and embedding of strategy. Further more the experiences clearly align with the broader literature. Following a review of literature, Franco and Bourne (2003) identify the most significant factors affecting the use of strategy and performance management. These factors are heavily influenced by the change management literature reflecting the need not only to manage the implementation but also the ongoing change that results from the review and management of strategic performance and are summarised as: Corporate culture; Alignment; Review and update; Communication and reporting; Involvement of employees; Management understanding; link to reward and recognition link; Management leadership and commitment; Clear and balanced framework; Agreement on strategy and strategic framework; Data processes and IT support.

The case study experiences link closely to these reported in the literature – building on key learning points already reported (Donoghue, 2007), the case study provides some interesting insights into the influence and application of these factors:

- The strategy process must have top leadership sponsorship;
- Organisation level initiatives require a strategic sponsor responsible for their development and successful implementation - emphasising the importance of dispersed leadership and accountability.
- The initial stage of the project involves building a strong consensus amongst the senior managers for the case for change. A more open style of communication provides managers from all departments with the opportunity to have a voice in the strategy. This is an essential early foundation in developing commitment around the new vision.
- Time is needed to translate strategy into operational terms which provide focus. These are then cascaded to all members of staff to support engagement and ownership. This can be difficult to achieve in practice, as there is an inevitable tendency for leaders and managers to concentrate their time on day to day activities and business as usual rather than engaging with the complexity of the ‘strategy’ map process. Ensuring local leadership of the strategy and its management is a key factor in its success (Martinez and Kennerley, 2006)
- Strategy delivery can be effectively supported by the development of a ‘balanced scorecard’ framework to manage performance. There can be a tendency for the “performance measurement” aspects to dominate the strategic agenda and this must be balanced as the culture of the organisation may not respond to a strategic framework being predominately measures driven.
• For an organisation such as a university, feedback from a number of staff has indicated that the balanced scorecard approach felt a little ‘top down’, and commercially driven. The language used in the strategy map was felt to be too direct and has been moderated to bring members of staff on board using language they were more familiar with – e.g. substituting the word customers for stakeholders and partners to describe the University’s relationship with students and research sponsors.
• The balanced scorecard framework approach alone did not create an opportunity to sufficiently consider the university’s values and the necessary environment needed to underpin successful strategy delivery. The University has added the organisational values on to the strategy map and is working to create the optimum environment for strategy delivery.
• Strategic alignment is a key part of the implementation challenge. For the strategy to be effectively cascaded throughout the University; all traditional planning activities must be fully integrated and supportive of the strategic priorities. The strategy map provides a powerful framework for aligning the strategic objectives to measures, targets, insights, decisions and transformational projects throughout the organisation (Kennerley and Mason, 2007)
• To make strategy everyone’s job, a wide range of creative communication approaches are needed to create a sense of momentum and encourage engagement. The strategic messages need to be simple and continual to ensure that they filter through to all levels. The approach chosen should also encourage ongoing two way feedback.
• Strategy must be fully integrated into the governance of the University; establishing strategy reviews and reporting processes to ensure ongoing focus upon the strategy. It is established in the literature that effective review processes are amongst the most important elements for implementing strategy and delivering strategic change (Martinez and Kennerley, 2007). Managing effective strategy and performance reviews at University, Strategic Theme and academic unit levels, supported by robust data, have been found to be fundamental building blocks.
• Further to the internal alignment, the University has also benefited from aligning external reporting to the strategy map framework. Unlike the rest of the public sector in the UK, there is not a standard performance framework imposed on Higher Education Institutions by central government. The Higher Education Funding Council (HEFCE) recognise the need for measures of performance to be linked to strategy and hence specific to each institution (Egan, 2008). Rather than imposing measures which may not be relevance HEFCE prefer to concentrate on the effectiveness of the institutions’ governing bodies. Hence the University of Leeds has been able to provide information to it Council and Senate that report progress on delivering its strategy.

Performance is an outcome of both organisational and human activities (de Waal, 2002), positive performance outcomes only arise when the behaviour of employees is aligned with strategy and when employees are motivated (Malina, M.A. and Selto, F.H., 2002). As a result it is crucial that performance management activities integrate culture, process, procedures and the management of people to generate learning and continually improve (Saltmarsh, D., Ireland, M. and McGregor, J. A., 2003). Indeed the case study reinforced Mintzberg’s (2004) (Figure 4) emphasis on the need to balance the art, science and craft of strategy to avoid strategy implementation being disconnected, dispiriting or disorganised as a result of over emphasis on one approach.
Although the journey towards world class and the realisation of the University’s vision continues the case study has demonstrates how a strategic change programme can bring soft and hard benefits in a higher educational institution. We saw some of the soft benefits quickly in terms of aligning the executive team around some core focused aims. We were able to generate a shared view of where we needed to go and the changes necessary to get us there. Hard benefits began emerging later in the implementation and continue to grow. Improvements have been observed in some of our key strategic priorities and measures such as increased research grants, increased student applications, increased first choice conversions, and an increase of our surplus for reinvestment. Furthermore in November 2007, the THES-QS world university rankings placed the University of Leeds as number 80, a jump of 41 places. 

Figure 4: The Practice of Management (Mintzberg, 2004)
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