



**ENGAGING
WITH LEADERS
IN HIGHER
EDUCATION**

**COLLABORATIONS,
ALLIANCES AND MERGERS**

SUPPORTING HIGHER EDUCATION

**Leadership
Foundation**
for Higher Education



COLLABORATIONS, ALLIANCES AND MERGERS

SUPPORTING HIGHER EDUCATION

Higher education is going through a significant period of change that is having far reaching implications. These changes are being driven by a number of factors including internationalisation, globalisation of higher education provision, and increasing competition fuelled in the UK by changing student needs and expectations. Changes to student funding in England in particular will have a big impact on institution behaviour.

Institutions are being challenged as never before to consider their fundamental role, position in the market, organisational structures, relationships with other providers, and partnerships with others, as well as a range of policies and processes. This is causing institutions to reflect on how they operate and are structured – particularly how they engage with other institutions and organisations to deliver value to their students and other stakeholders. This raises the profile of collaborations, alliances and mergers (CAM) in the sector.

THE CAM AGENDA

Over the years the Leadership Foundation has developed trusted relationships with the sector and sector bodies. This means that it is well placed to offer advice and support in the three areas of what is being called the ‘CAM agenda’:

Collaboration

where two or more partners are seeking to work together in a particular area of business, which may involve combining existing operations or creating something entirely new

Alliance

which is a more systematic form of collaboration between two or more partners, covering a wider range of their operations

Merger

where two or more partners combine to create a single institution, which may retain the name and legal status of one of them or be an entirely new legal entity.

OPTIONS FOR SUPPORTING HIGHER EDUCATION

The Leadership Foundation is working at a national level with the Higher Education Funding Council for England (Hefce) and other sector bodies on the CAM agenda and on the wider work being done to improve efficiencies. As a result, and in response to demand from the sector, we are now able to offer to offer advisers to support HEIs in their strategic thinking and action around this increasingly important agenda.

We can work as a trusted critical friend, supporting and advising before you make any formal commitments to a possible collaboration, alliance or merger, or helping you progress plans that are already in place. This advice could cover a wider range of activities, including:

- Working at a strategic level during the early, often totally confidential part of the process when a small group of senior leaders are considering possible options.
- Building the business case for a collaboration, alliance or merger and helping to gather the evidence to inform decision making.
- Developing a vision for the project that involves a range of institutions and potential partners to help shape decision making.
- Engaging with stakeholders, especially staff and students, in a neutral way to help move the debate about options forwards.
- Engaging senior management and governors in thinking about the management structure and governance arrangements for the proposed project.
- Facilitating a joint working group or shadow board to explore options and implementation.
- Assisting institutional partners in the development processes of achieving mergers appropriate to their particular settings.
- Actively working with partners in particular facets of the reconfiguration process.

OUR TEAM

We have pulled together a very experienced team of advisers to provide support to higher education for the CAM agenda. Our team has hands on experience of supporting higher education providers deal with the many twists and turns that inevitably feature in discussions about collaborations, alliances and mergers.

John Lakin



John is a highly experienced adviser with over 30 years experience in the sector. He has advised both Hefce and HEIs on the strategic case for collaborations and mergers in the UK, as well as on alliances between HEIs internationally. John was previously head of Higher Education Consulting for PricewaterhouseCoopers.

Andy Shenstone



Andy has supported transformation initiatives in over 40 universities in the UK and overseas. He is a recognised expert in collaborations, alliances and mergers where he particularly focuses upon engaging governing bodies and institutional leaders in devising and realising the vision for major strategic change. Andy is director of Higher Education and Further Education, Capita Consulting.

Dr Tom Kennie



Tom has worked with the senior leaders of over 60 HEIs across the UK and Ireland. He has been engaged to assist with several projects involving the establishment or refocusing of strategic institutional alliances and in facilitating institutional mergers. Prior to moving into consultancy he also gained first-hand experience of a major merger of two large professional service firms in his role as director of Human Resources. Tom is a founding director of Ranmore Consulting.

John Davies



Emeritus Professor John Davies has extensive international experience in collaborations, mergers and alliances. As a senior university officer, he was pro vice-chancellor in both Anglia Ruskin University, UK and La Trobe University, Australia, in which he was actively engaged in planning mergers and subsequently in the implementation processes. He has been a consultant in institutional mergers in Ireland and Finland and with the OECD and numerous regional partnerships.

CONTACT US FOR A CONFIDENTIAL INITIAL CONVERSATION

If you would like to have an initial, completely confidential, discussion about your thoughts, aspirations and options for the future, please contact:

Tom Irvine, Director of Consultancy

T: 020 7849 6915

E: tom.irvine@lfhe.ac.uk

OTHER REFERENCE MATERIAL

Collaborations and mergers in HE: Lessons Learned and Future Prospects

Glynne Stanfield, Eversheds LLP (To be published)

Higher Education Collaborations: Implications for leadership, governance and management

Ruth Levitt, RAND Europe; Helen Goreham, Leadership Foundation for Higher Education; and Stephanie Diepeveen, RAND Europe (Oct 2011)

Collaborations in Wales

Dr Alison Parken, Lecturer at Cardiff University and Independent Research Consultant (Oct 2011)

Shared Services in Higher Education (Knowledge Resource)

Helen Goreham, Leadership Foundation for Higher Education (Sept 2011)

Mergers in Higher Education (Knowledge Resource)

Helen Goreham, Leadership Foundation for Higher Education (Sept 2011)

Leadership and Management of International Partnerships

John Fielden, CHEMS Consulting (Apr 2011)

Conversations and Collaborations: The Leadership of Collaborative Projects between Higher Education and the Arts and Cultural Sector

Kate Oakley and Sara Selwood, Independent Research Consultants (Mar 2010)

Higher Education Leadership of Regional and Local Regeneration Partnerships: Learning from good practice

Glyn Owen, University of Lincoln (Apr 2008)

All these materials can be downloaded from the Leadership Foundation website at:

www.lfhe.ac.uk/publications/lfresearch/
www.lfhe.ac.uk/publications/resources/

Connect with us:



Follow us on Twitter

www.twitter.com/LFHMarketing



Join us on Facebook

<http://on.fb.me/LFFacebook>



Join us on LinkedIn

<http://linkd.in/LFHELinkedIn>



Visit our Website

www.lfhe.ac.uk

**Leadership
Foundation**
for Higher Education

First Floor, Holborn Gate
330 High Holborn
London
WC1V 7QT

T 020 7849 6900
F 020 7849 6901
E info@lfhe.ac.uk
www.lfhe.ac.uk



Please consider your environmental responsibilities and, if printing this pdf recycle the hard copy after use.