

Successful Transition Planning for Higher Education Institutions

STEP FOUR – IMPLEMENTATION

BEFORE IMPLEMENTATION

- Collect and analyse the views of HEI stakeholders
- Review earlier market and spend analysis for changes
- Scrutinize your requirements and draft contract. Buy-in external expertise if needed before proceeding
- Have an accurate picture of your service assets and resources
- Understand the product and service architectures
- Understand the SLAs and incentives, and make sure they are commercially focused
- Have copies of your 3rd party contracts and understand their strengths and weaknesses
- Know the current cost of service provision
- Understand and where possible share the risks and responsibilities
- Research and understand the market, how much more or less it will cost and how much better the service will be
- Identify your “experts” and use them – and keep them
- Know unambiguously what your problems are and either fix them or know how to – how long it will take and costs involved
- Consider views of HEI vs. provider branding

DURING IMPLEMENTATION

- Maintain the knowledge and understanding of the team that negotiated your contract – and their rationale
- Continue to gather and maintain knowledge about the service in-transition
- Understand and monitor your technology and service roadmaps and make sure your new provider understands them too
- Map the data and process flows between your institution (including any international operations) and external systems
- Benchmark the service cost and performance and know the gaps between your experience and that of others
- Communicate to staff on both sides how the operation will continue to contribute to the HEI strategy
- Use new information during implementation to update projected whole life cost models and review with supplier
- Encourage and support the provider to develop useful transparent metrics and data on the health of the operation

AFTER IMPLEMENTATION

- Understand your contracts - and the suppliers contracts and how your suppliers are behaving
- Understand any lock in or balloon payments to suppliers, including lower tier suppliers
- Identify your key people, who holds the knowledge and experience of how your services are configured and how the systems fit together
- Review the documentation on ICT assets that have been handed over to the service provider
- Monitor outputs as well as feedback and trends from HEI staff and students
- Seek external verification of benefits realisation where appropriate
- Continuously assess performance and re-assessment of risk within the contract
- Handle stakeholder complaints
- Chair any agreed supplier/buyer contract review meetings
- Make sure you have put in place an effective exit plan – and have tested it (agree it before you sign the contract)

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Strategic Sourcing in HEIs:

This work was carried out by researchers at the Bristol Business School at the University of the West of England, and was funded by the Innovation Transformation Fund 2012.

Sources used for the development of this tool included:

Material provided by Jim Reed, Director of Procurement, University of Nottingham in 2013

CIPS (2013) Position on practice: Contract Management, Chartered Institute for Purchasing and Supply

Interviews with Higher Education sector managers

Interviews with Public and Private sector organisations

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