



THE HIGHER EDUCATION EXPERIENCE

HEDx Health-Check

Higher Education
Strategy & Culture Self-Assessment

Executive Review

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Strategy
& Culture
Review

About HEDx

HEDx is a higher education advisory firm founded by former Deputy Vice Chancellor, now Emeritus Professor, Martin Betts and Australia's leading organisational brand strategy and culture firm, The Brand Institute of Australia. HEDx delivers strategic advisory services for executives of universities and other higher education institutions, with a focus on shaping new business models, steering transformation and improving student, staff and stakeholder experiences.

Following significant disruption to the sector as a result of COVID-19, innovative leadership, new revenue streams, improved student recruitment and refining and stabilising on-campus culture are all key components in securing the future of higher education institutions through this unprecedented period.

Our organisational performance and cultural leadership services are designed to facilitate and support this now critical transition from the former ways of working to the COVID and post-COVID student, staff and partner world.

With over 20 years experience consulting to some the world's largest organisations, including Google, Microsoft, NAB, Bupa and Macquarie Bank, The Brand Institute, in conjunction with Professor Martin Betts' 40 years of experience in both academic and leadership roles in universities in around the world, HEDx applies proven best-practice culture, reputation-shaping and transformation solutions to cement the profitability and viability of higher education providers into the next decade and beyond.

The future of higher education will be decided by action, or inertia.



Progress begins with reflection.

The HEDx self-assessment tool has been developed to assist universities in identifying areas of strategic and cultural challenge and opportunity.

While the Health-check remains the property of HEDx, we encourage universities to openly utilise the self-assessment question sets with their executive teams and broader stakeholders community.

For more information, or any assistance please visit hedx.com.au or go to contact@hedx.com.au



About the HEDx Health Check

HEDx has established a set of key questions, sector benchmark metrics and an improvement methodology to support university executive teams in assessing the strategic health of their strategy, culture, and internal and external engagement. It helps them ask the questions, and self-assess their preparedness for a future, in response to the COVID-19 pandemic and the specific implications it has for the higher education sector. After substantial consultation with multiple stakeholders, sector leaders and policy advisors, HEDx has developed a Strategy and Culture Performance Framework (HEDx Health Check) that comprises a range of relevant KPIs, observable performance monitors, and an improvement methodology.

The self assessment tool and its associated metrics provide a useful frame of reference, to allow universities to question and generate data and qualitative information, with the opportunity for further assistance and advice by HEDx to validate a self-assessment before identifying and acting on areas for improvement in strategy, reputation, culture, risk and opportunity.

This tool and its associated process of application has been derived from the sector, but in line with out-of-sector, insight-based strategic tools (e.g. APRA self-assessment in financial services) to ensure engagement and strategic validity.

HEDx Self Assessment Methodology

A. Who conducts the two levels of HEDx Self Assessment?

- The initial self assessment can be made by the VC and Executive Team using the 5 top level strategy questions to self-assess your current state against graded levels of current institution performance benchmarks we have observed in the sector.
- Greater fidelity in the understanding of the current level of maturity of your university requires more detailed consideration of second level strategy questions with the assistance of HEDx. The most appropriate team of stakeholders to do this is a subset of the university executive. This might include: the VC, DVCs, PVCs and senior professional services staff. We recommend the HEDx team conduct a facilitated workshop session with your team to best understand the tool and its use.

B. How long does the the HEDx Self Assessment take?

- Typically the second level HEDx self assessment takes between 2 and 3 hours in a workshop session but is ideally validated by more detailed investigation by the HEDx and self-assessment teams over 2 to 3 weeks. During this time, the HEDx team is available to guide and assist you to complete the assessment process.

C. What Information is derived from the the HEDx Self Assessment?

- Current-state observational data forms the initial part of a broader HEDx strategy, stakeholder engagement, reputation and culture assessment, however the initial self-assessment insights provide valuable context from which strategy can be assessed and shaped.

The HEDx Health Check provides universities with a candid self appraisal of key performance elements all of which are under unprecedented pressure currently. These include: university strategy, stakeholder engagement, reputation, culture stability and strategic alignment along with brand strategy and identity all of which go beyond the current narrow focus on financial status and compliance.

Findings from the HEDx Health Check, and the process of completing it, form the basis for strategy, engagement, and reputation transformation work-streams vital for current times. Insights provide a clear, central baseline along with obvious performance development opportunities.

HEDx Self Assessment Methodology (Cont.)

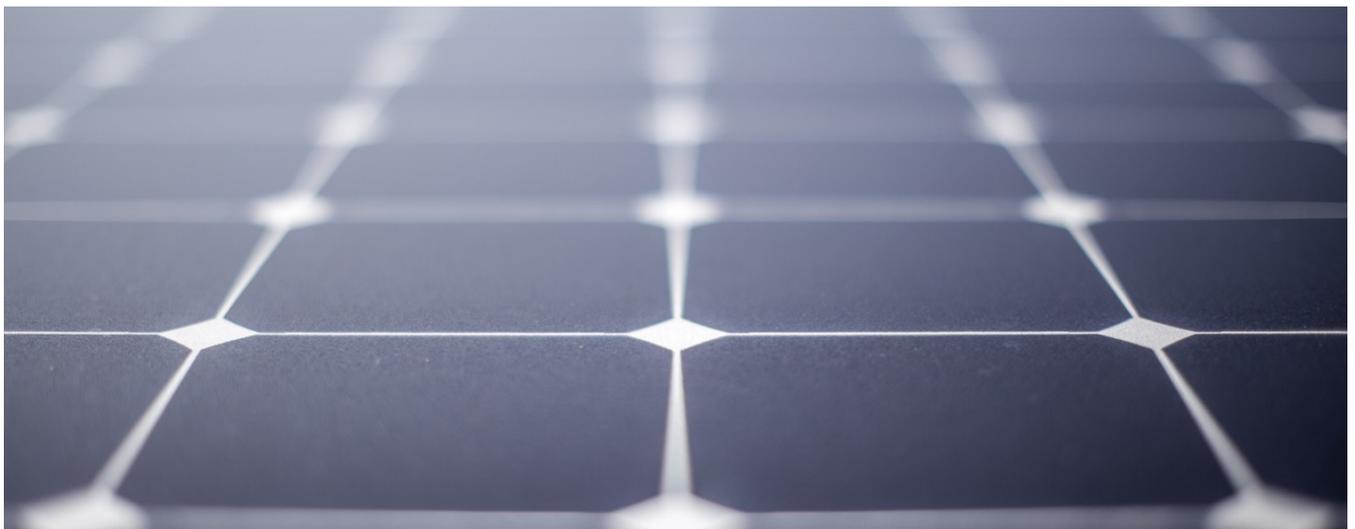
D. What is the next step following the HEDx Self Assessment?

- The HEDx Health Check, and the process of applying it, is a valuable organisational asset in its own right. However it is also Part One of a three part organisational optimisation process and methodology available to your organisation.

The HEDx process involves:

- (i) HEDx assistance to second level Health Check self assessment.
- (ii) HEDx Review of detailed assessment of organisational strategic maturity with your leadership teams and other internal and external stakeholders.

(iii) Strategic Repositioning and Transformation Development. HEDx working with members of your leadership teams to plan, design and implement strategic health improvement programs across the most relevant areas of future strategy, staff engagement, student sentiment, partner engagement, and organisational culture as they become established as priorities from self-assessment and review by HEDx.



HEDx HEALTH CHECK OVERVIEW

FUTURE STATE

1. What is the reputation of your university, its capacity for a differentiated position and alignment across brand, staff, student and partner experiences?

	Score
We have no systematic data on reputation against competitors and are unaware of a need to measure or update reputation health. We lack any capacity for strategy development right now and are focused on managing BAU rather than seeking new differentiation or business model change.	1
We have some data on reputation against competitors but are now unaware of how this has changed recently. We are giving some thought to strategy and brand enhancement but major differentiation and changes to BAU through new business models is not imminent.	2
We have had some data on reputation against competitors in the past but lack up to date data. We are reviewing our university strategy with minor changes anticipated in the speed of achieving current strategic goals within the same business model against known competitors.	3
We are updating reputation health data and contemplate significant changes to strategy and brand positioning based on significant changes to our business model to reposition ourselves and point of differentiation against known competitors.	4
We are fully aware of changes in reputation in a market whose structural changes we are fully aware of. We are repositioning significantly against current and future competitors based on full digital maturity, aligned strategy and experience, and strategic differentiation.	5

Second level future state HEDx strategy questions for further investigation and review:

- a. What is your university reputation and competitor awareness?
- b. What is university strategy brand and reputation development capability and capacity?
- c. What is the level of awareness of disruption by new providers and non-sector competitors?
- d. Are university strategy and student, staff and partner experiences all aligned?
- e. What is your measure of future preparedness and organisational readiness for change?
- f. How distinctive and differentiated is your university strategy?
- g. What is your level of digital maturity and preparedness?

HEDx HEALTH CHECK OVERVIEW

STAFF ENGAGEMENT

2. What are your staff experiencing and are your culture and capacity for innovation and collaboration, mature and aligned with your strategic intent?

	Score
We fear our staff are struggling to adjust to major organisational change and job losses with major disruption and low morale. There is little on-campus attendance and campus and digital facilities and staff practices are now poorly aligned to the extent we are aware.	1
Staff are starting to adjust to organisational change slowly and recovering from what are now known job losses. Campus life is resuming and we are starting to know how to reposition digital and physical assets with new staff practices and rebuild culture.	2
New staff teams and practices, following organisational change, are settling and new approaches to campus planning and digital practice are providing opportunities for new cultural advancement, organisational development and collaboration.	3
Staff experiences are known and improving. New initiatives and digital practice maturity and new innovations are being shared and celebrated. New practices and processes are operating in new physical and virtual environments leading to new collaborations.	4
Staff experience and engagement are at pre-COVID levels and staff culture and leadership practices reinvigorated with new innovation and collaboration. New models for optimisation of visual and physical assets and practices are commonplace and well-accepted.	5

Second level staff engagement HEDx strategy questions for further investigation and review:

- a. What is the current staff experience and their level of engagement?
- b. What are levels of academic and professional staff culture maturity?
- c. What is your innovation capacity around academic work and professional projects?
- d. What are the levels of collaboration and connectivity in academic and professional work?
- e. What are the levels of multi-disciplinary or flexible skills amongst staff?
- f. To what extent are physical and virtual assets optimised including campus space?
- g. What are the levels of data maturity and analytic capability of staff experiences?

HEDx HEALTH CHECK OVERVIEW

STUDENT SENTIMENT

3. What are students experiencing in regard to your brand promise and is that experience relevant, flexible and felt by them to be good value for money?

	Score
We believe students are having inferior learning, social interaction and support experiences leading to brand and reputation damage and reduced levels of student engagement, achievement, retention, and graduate outcomes. We have no post-COVID strategy to improve student sentiment.	1
We have limited data on student engagement or experiences and the impact on brand and reputation. We are amending student engagement strategies and commencing initiatives for new practices in a post-COVID strategy and have an emerging focus on student sentiment.	2
We have current student engagement and experience data in a post-COVID environment and are making comparisons to long-term trajectories. We have an emerging post-COVID student sentiment focus with new initiatives starting to be applied bottom-up in different areas.	3
We are comparing current student experience data against pre-COVID trajectories and are able to make forecasts about future scenarios. This analysis has been the basis of a maturing post-COVID student sentiment strategy starting to be communicated university-wide.	4
We have clear and mature data on full student life-cycle engagement experiences from future students through to alumni and can make reliable forecasts of future trajectories that have developed into strategies for university-wide student sentiment enhancement in the coming period.	5

Second level student sentiment HEDx strategy questions for further investigation and review:

- What is the current student experience of learning and support?
- What is your current student commitment and support of your brand and reputation?
- How relevant are current student experiences and is there flexibility and student centricity?
- What is the current quality of student learning experiences?
- What is the current state and diversification readiness in income streams with particular focus on agility in response to international student numbers?
- How much student life cycle orientation is there in the combination of marketing, admissions, orientation, learning experiences, graduation and alumni engagement?
- What level of data maturity and analytic capability is there of student experiences?

HEDx HEALTH CHECK OVERVIEW

PARTNER ENGAGEMENT

4. How do partners judge your graduates and research, their relationship with you, and the ease of partnering with you in a coherent and integrated way?

	Score
We have lost touch with many partners recently and are focussed on current staff and students with little data on partner perceptions and experiences. Partner experience and focus is not central to current strategy and responsibility rests with various areas.	1
We believe partners experiences and plans to engage with us are not their current focus. We will return to optimising partner experiences from diverse academic area activities in later stages of organisational recovery and strategy development.	2
We have re-established relationships with key partners and are starting to understand their revised needs. This is leading us to revisit governance, strategy and capacity to enhance student experience and explore new income streams and new capacity and strategy.	3
Our revised partner strategy and governance arrangements adopt whole of university approaches that optimise resources and partner experiences. We know the impact on student experiences and are modelling new income opportunities.	4
Optimising partner engagement is central to a new diversified university strategy with new governance, capacity and initiatives in place of digital disruptive innovation practices that are part of a new business model central to strategic future goals.	5

Second level partner engagement HEDx strategy questions for further investigation and review:

- What are your partner experiences of your graduates and research?
- What is your partner assessment of your university reputation?
- What is your partner evaluation of external relationship governance?
- What is your partner assessment of university relationship strategy and support?
- How easy are you to find, understand and to engage with by your external partners?
- How cohesive and integrated are university offering in the experience of partners?
- How integral are external partnerships to strategy and culture at your university and how much innovation do you programs for external engagement have?

HEDx HEALTH CHECK OVERVIEW
CULTURE, COLLABORATION AND COMMUNICATION

5. Are mission and values, and a culture of authenticity, truth and transparency recognised by stakeholders?

	Score
We suspect that staff, students, partners and other stakeholders lack commitment and engagement with the university mission and question alignment of values with leadership practices. Brand and reputation is at risk. Comms focus on change and reputation and not culture and strategy.	1
There is some evidence of reduced stakeholder engagement and commitment and lack of mission awareness. Attempts to ensure transparency and authenticity are not fully accepted and there is some evidence of brand and reputation pressure with strategy opaqueness emerging.	2
Stakeholder engagement and commitment is being rebuilt with emerging clarity on university mission and values and reputation and brand enhancement and communication based on increased leadership capacity and maturity and increased staff satisfaction.	3
Maturing improvements in staff and stakeholder engagement and communication with strong mission and values alignment is emerging from a planned strategy that is targeting advances in competitive brand and reputation health as a central element of leadership culture.	4
Staff and stakeholders are celebrating the levels of truth, transparency and authenticity of leaders aligning their behaviour and comms with university mission and values to a point where brand and reputation advantages over competitors are already evident and growing.	5

Second level culture HEDx strategy questions for further investigation and review:

- a. How much trust, transparency and staff satisfaction is there with culture and strategy?
- b. Is there shared mission and purpose amongst your staff, students and partners?
- c. Is there clarity on university values and their alignment with strategy and culture?
- d. Do you have adequate culture enhancement and transformation leadership capacity?
- e. Do you have the right reputation and brand strategy governance and capacity?
- f. Is there sufficient alignment between your reputation, brand comms, and stakeholder experiences?
- g. Do you have adequate communication and leadership advisory and facilitation capacity?

HEDx HEALTH CHECK OVERVIEW OVERALL SCORES

Overall scores from first level self-assessment health check rating

Overall HEDx Health Check Assessment	Score
Your entire strategic health is particularly vulnerable and in need of urgent attention and remedial transformation	★ 5-9
You have substantial aspects of strategic vulnerability requiring broad-based strategic transformation and strategy, engagement and cultural enhancement	★★ 10-13
You have pockets of good practice and areas in need of improvement. HEDx is well placed to investigate more deeply and see where we can help you most	★★★ 14-17
Your strategic health is well advanced and sector competitive and able to be assisted in specific areas through HEDx transformation programs	★★★★ 18-21
Your strategic health is outstanding and sector leading and the focus for HEDx assistance will be promoting and maintaining this leading position	★★★★★ 22-25

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