

AUDE

AUDE Summer School

15-18 November 2021

University of Birmingham





Headline Supporter

Sir Robert M^CALPINE





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Overview of AUDE

AUDE promotes excellence in the strategic planning, management, operation and development of higher education estates and facilities. AUDE offers membership to publicly funded UK bodies whose primary remit is higher education teaching and/or research, AUDE has a growing number of private providers of higher education and international universities. There are also business partner opportunities for commercial bodies.

We are the UK's leading source of expert information about the university estates and facilities sector and work to ensure estates professionals are equipped to take a strategic and proactive approach. AUDE is a not-for-profit organisation. Any funds generated through the activities of the Association are used to fulfil its objectives and mission.

AUDE's members are generally represented by the most senior member of staff responsible for managing, planning, constructing and maintaining all types of accommodation for higher education institutions. Though arrangements vary, most directors of estates are also involved in managing a wider range of capital projects and services including cleaning, security, grounds maintenance, space planning and management, car parking and traffic and, in some institutions, additional services such as catering, conference and sports facilities, insurance, furniture and equipment and printing.

Our membership offer is growing, and we provide benefits and services for all those working in estates and FM within education.

A primary objective is to make sure that university estates provide best value for money and contribute positively to a high-quality student experience. Estates are one of the university's largest assets, AUDE and its members are at the forefront of ensuring that universities use this valuable asset to full advantage. There is a clear link between the buildings, facilities and accommodation on offer at a university and the desirability of the establishment to potential students and staff.

Our members

AUDE currently has over 2,733 individual members from;

- 185 UK and Ireland higher education institutions
- 6 international institutions
- 7 business partners
- 8 alternative providers

Joining AUDE will allow your organisation to develop and grow relationships with estates and FM professionals in the HE sector. Speak to a member of the AUDE team or visit aude. ac.uk/membership for further details.

AUDE contact details

Jane White,
AUDE Executive Director,
Association of University
Directors of Estates,
3 Holywell Drive,
Loughborough University,
Loughborough
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Welcome Address

Congratulations on your nomination to attend the inaugural AUDE Summer School. This is now 4 years since the Summer School was established in 2018. The plan was that the Summer School was to become an established part of the AUDE calendar. The world COVID19 pandemic has clearly affected all our lives and the work of the association is no different. I was able to welcome candidates to the first Summer School and a real pleasure to do so four years on.

The Summer School is a development programme, and should not be seen as a one off course. The AUDE executive believe that experience will both help develop talent from within the sector but also provide a springboard for those extremely capable individuals to progress their experience and ultimately their career. This is your opportunity to make networks which could sustain you across the whole of your career. Do get involved and see this as the first step, not a single moment in time!

Unlike training events, the development programme is being delivered almost exclusively by Directors of Estates. The emphasis is not on how activities are undertaken but on choosing what strategies are most appropriate depending upon timings and circumstances for your particular university. Candidates for the Summer School are drawn from a number of disciplines, so this is your opportunity to learn from your peers as well as those presenting at the Summer School.

As a development programme it is really important that we continue to maintain the ongoing value of working with candidates and a follow up 6-month refresher update will be notified to you during the Summer School.

We will also be asking you to work in project teams and produce reports which will not only be beneficial to your institution but also to others. The best report will be presented at our annual conference which next year is being hosted at the University of Birmingham.

On behalf of the AUDE Executive please do enjoy the Summer School. Let us know how we can improve the event for the future and the AUDE team very much look forward to seeing you during the next few days and on an ongoing basis in the near future.

With best wishes



Keith Lilley

Director of Estates and Facilities Management, University of Sheffield

Programme

Programme

Monday 15 November 2021

All sessions will take place at the Edgbaston Park Hotel and Conference Centre in the Pevsner Room, First Floor, and the evening dinners at the Composers' Suite, First Floor.

DATE	SESSION	SPEAKER	
10.00 10.30	Delegate arrivals, registration and refreshments		
10:00 - 10:30	First floor		
	Welcome and introductions	Keith Lilley, Director of Estates, Facilities	
10:30 - 10:45	Pevsner Room	Management, University of Sheffield	
10/5 1100	Welcome from the University of Birmingham	Trevor Payne, Director of Estates,	
10:45 - 11:00	Pevsner Room	University of Birmingham	
11:00 - 12:30	Introductions and overview of AUDE Summer School; purpose, process and deliverables	Mark Swales FINSTLM, HE and Leadership Consultant	
	Pevsner Room		
12:30 - 13:30	Lunch and networking		
12.30 - 13.30	1900 Restaurant, Ground Floor		
13:30 - 14:30	Session 1: Managing behaviour and change in HEI projects	Dr Nigel Oseland, Psychologist, Workplace Unlimited	
	Pevsner Room	Workplace of infrinced	

14:30 - 14:50 Refreshment break

	Keith Lilley , Director of Estates, Facilities Management, University of Sheffield
Pevsner Room	

15:50 - 16:10 Refreshment break

16:10 - 17:10	Session 3: The sustainable campus Pevsner Room	Andy Nolan, Development and Sustainability Director, University of Nottingham and Chair of AUDE Sustainability Advisory Group
17:10 - 18:00 Accommodation check-in Reception		
18:30 - 19:00	Evening speaker The Composers' Suite	Dervilla Mitchell, Joint Deputy Chair, ARUP
19:00 - 21:00	Dinner and networking The Composers' Suite	

Tuesday 16 November 2021

27.20	Breakfast	
07:30 - 09:00	1900 Restaurant, Ground Floor	
09:00 - 09:45	Group process: reflections on learning and key insights Pevsner Room	Mark Swales FINSTLM, HE and Leadership Consultant
09:45 - 10:45	Session 4: Strategic FM in a changing environment Pevsner Room	Lucy Black MSc FIWFM, Head of Facilities and Student Accommodation, University of Plymouth and Chair AUDE Strategic Facilities Management Group Heather Kerrick, Assistant Director of Estates and Facilities, University of Huddersfield Lisa Woods, Head of Campus Services, University of Sheffield
10:45 - 11:05	Refreshment break	
11:05 - 12:05	Session 5: Managing a large estate - focus backlog maintenance Pevsner Room	Grant Ferguson, Interim Director of Estates, University of Edinburgh
12:05 - 13:05	Lunch and networking 1900 Restaurant, Ground Floor	
13:05 - 14:05	Session 6: Institutional risks – how Directors of Estates/Facilities and Finance can work together to manage these FACILITIES V FINANCE – Friend or Foe? Pevsner Room	Andrew Burgess, Director of Estates, Facilities and Commercial Services, Lancaster University Sarah Randall-Paley, Director of Finance, Lancaster University
14:05 - 14:25	Refreshment break	
14:25 - 15:25	Session 7: What does Health & Safety Compliance mean for a Director of Estates? Pevsner Room	Stewart Crowe, Assistant Director and lead for Health and Safety at Liverpool University Hospital NHS Foundation Trust
15:25 - 15:45	Refreshment break	
15:45 - 16:45	Session 8: Influencing the board working with senior teams - Nominating student accommodation rooms Pevsner Room	Umesh Desai, Director of Estates and Facilities, DeMontfort University
16:45 - 17:30	Group project work	
18:30 - 19:00	Evening speaker The Composers' Suite	Mark Reynolds, Group Chief Executive, Mace
19:00 - 21:00	Dinner and networking The Composers' Suite	

Wednesday 17 November 2021

07:30 - 09:00	Breakfast	
	1900 Restaurant, Ground Floor	
09:00 - 09:45	Group process: reflections on learning and key insights Pevsner Room	Mark Swales FINSTLM, HE and Leadership Consultant
09:45 - 10:45	Session 9: Organisational story telling - performance management Pevsner Room	Daniel Ladbury, Director of Estates and Facilities, Sheffield Hallam University
10:45 - 11:05	1:05 Refreshment break	
11:05 - 12:05	Session 10: Planning for the Next Generation University Pevsner Room	Professor Kathleen Armour, Pro-Vice-Chancellor (Education), University of Birmingham
	Lunch and networking	

14:05 - 14:25 Refreshment break

Pevsner Room

1900 Restaurant, Ground Floor

Creating places for an ever changing landscape

Session 11: Building heart -

12:05 - 13:05

13:05 - 14:05

14:25 - 15:25	Session 12: The Mindful Leader Pevsner Room	Mark Swales, HE and Leadership Consultant
15:30 - 17:00	University of Birmingham presentation and estate tour	
18:00 - 18:30	Last evening pre-dinner drinks reception Bar and Lounge, Ground Floor	
18:30 - 19:15	Sponsored evening speaker The Composers' Suite	Alison Cox, Managing Director, London, Sir Robert McAlpine
19:15 - 21:00	Dinner and networking The Composers' Suite	

Thursday 18 November 2021

	07:30 - 09:00	Breakfast	
	07.30 - 09.00	1900 Restaurant, Ground Floor	
	09:00 - 09:30	Group process: reflections on learning and key insights	Mark Swales, HE and Leadership Consultant
09:30	09:30 - 11:00	Session 13: Presenting with impact	Louisa Clarke, Verbal Communications Specialist
	03.30 - 11.00	Pevsner Room	Louisa Clarke, Verbar Communications Specialist

11:00 - 11:20 Refreshment break

11:20 - 12:20	Group presentations Peysner Room	
12:20 - 12:30	Chair's closing comments Pevsner Room	Stephen Wells, Director of Estates, Facilities and Commercial Services, University of Surrey
12:30	Residential closes (Pre-ordered packed lunches available if requested)	



Helen Wallace, Head of Space Management and

Design, University of Exeter Julian Gitsham, Principal, Hassell

Your Host



Mark Swales, FINSTLM HE and Leadership Consultant

Mark has worked in the Higher Education Sector at a senior leadership level since 1988 with a strong focus on the development of commercial, estates and facilities management services. He has chaired four UK national sector bodies bringing together higher education professionals from a wide range of disciplines to share best practice and improve performance.

Mark has a Masters degree and is a graduate of the sector's Entrepreneurial Leaders Programme delivered in partnership with Oxford University's Siad Business School. Mark has also participated in the Common Purpose Programme and is a graduate of the Work Foundation's Oxford Balliol College Runge Effective Leadership Development Programme. He is a Fellow of the Institute of Leadership and Management.

He was Chief Estates and Facilities Officer for Sheffield Hallam University between 2010 and 2020, one of the largest providers of Higher Education in the United Kingdom where he was primarily responsible for its estates, facilities, commercial and academic timetabling functions. He delivered multi million pound campus developments including the RIBA award winning Heart of the Campus Social Sciences Building. In driving the sustainability agenda Mark lead the project which saw Sheffield Hallam gain the ISO for Environmental and Energy Management, another first for the sector.

He has throughout his career held a strong interest in education and training. His Directorate was the first in a UK University to be awarded Investors In People Gold and Recognised for Excellence from the British Quality Foundation. He opened the very first NVQ Centre for front line support staff in a UK HEI.

Mark was recently appointed Vice Chair of DN Colleges Group which is a dynamic education provider in South Yorkshire, Greater Lincolnshire and the Humber Region, focused on transforming its communities through learning. The Group is the largest provider of Higher Education in Further Education and the largest provider of apprenticeships in the United Kingdom.

As Chair for the last four years of the International Summit on Innovative Learning Spaces, Mark has gained an international reputation for his knowledge of how changes in pedagogy are influencing both physical and digital learning space design. Attracting speakers and delegates from all five continents, Mark has gained a global perspective of the challenges many directors of estate's and IT are facing. Mark has previously chaired a range of other sector events and presented at leadership development programmes.

Being aware of the importance of work life balance in the sector, Mark delivered mindfulness training and practice into Sheffield Hallam University and continues to delivery sessions in Sheffield and for AUDE and other organisations. He is a keen walker, mountain biker, runner and ballroom dancer as well as spending time with his family and grandchildren.

Speaker Biographies

Speaker Biographies (A-Z)



Professor Kathleen Armour Pro-Vice-Chancellor (Education), University of Birmingham

As Pro-Vice-Chancellor (Education) and member of the Executive Board, I am responsible for delivering the University's Strategic Plan for Education. I am also leading a major change programme including making revisions to our academic teaching year, programme architecture (with a renewed focus on employability), student administration systems, and timetabling. I am academic lead for our Higher Education Futures institute (HEFi) which is an open-access staff development unit designed to support the career-long development of academic staff in teaching and learning, and share good practice internally and externally.



Lucy Black MSc FIWFM
Head of Facilities and Student
Accommodation, University
of Plymouth and Chair
AUDE Strategic Facilities
Management Group

Lucy is the University of Plymouth's Head of Facilities and Student Accommodation and chair of AUDE's Strategic FM group. Lucy has previously held similar roles in university, local authority, NHS and charity sectors and has 30 years' experience in facilities management, leading and developing teams and services. She is a fellow of the Institute of Workplace and Facilities Management, where she was a non-executive director for 6 years and was chair of a large leisure trust.



Andrew BurgessDirector of Estates, Facilities and Commercial Services, Lancaster University

Andrew Burgess, Director of Estates, Facilities and Commercial Services. Andrew Burgess joined Lancaster University in September 2018. His portfolio includes leading the delivery of the University masterplan and capital programme; facilities services, commercial services and sport. Prior to joining Lancaster he was previously the Director of Infrastructure and Commercial Services (Deputy Chief Operating Officer) at Loughborough University from 2007, he held various roles including a period as Acting Chief Operating Officer. From an initial career in the construction industry, Andrew moved into a building surveying consultancy role and has held various roles in the universities of Central Lancashire, Southampton and Liverpool. Andrew is a Chartered Surveyor by Profession.



Louisa Clarke Verbal Communications Specialist

She is also a Level 1 qualified Restorative Facilitator.

Since 2014 Louisa has worked in both the creative and corporate sectors, and with individuals and organisations alike. She has a track record for building confidence in her clients as communicators, releasing their optimal courage, creativity and productivity. She works with businesses to help

Louisa Clarke is a qualified and highly experienced voice coach and verbal communication specialist.

She trained and worked as a professional actor before studying for an MFA in Voice on the prestigious course at the Royal Central School of Speech and Drama, graduating with distinction.

them discover the power of ethical communication strategies as a cultural choice.

www.louisajanevoice.com



Stewart Crowe
Assistant Director and lead for Health and
Safety at Liverpool
University Hospital NHS
Foundation Trust

After graduating in Safety, Health & Environmental Management at Leeds Beckett University Stewart started his career in the steel industry. Stewart a Chartered Member of Institute of Occupational Safety and Health (IOSH) then moved to London to start his health and safety career within Transport for London. Immersed within London Underground Limited as an Operational Track and Civils Health, Safety, Quality and Environmental Adviser Stewart worked with Trade Unions to revitalise safety management at the sharp end for operational staff, aiding the safe movement of 1,229 million passengers across the network. Returning to Liverpool Stewart worked within the NHS at the Liverpool Women's NHS Foundation Trust and the University of Liverpool where he attained an MBA and was Head of Risk and Assurance. Centred within the Facilities, Residential and Commercial Service team at the University of Liverpool Stewart's focus was on sensible risk management of health, safety and fire across a large multi-site complex estate whilst providing the University with assurance of compliance based on empirical data.

Stewart is now an Assistant Director and lead for Health and Safety at Liverpool University Hospital NHS Foundation Trust. A Trust that runs four large hospitals within the City of Liverpool; Aintree University Hospital, Broadgreen Hospital, Liverpool University Dental Hospital and the Royal Liverpool University Hospital. In his tenure Stewart also oversees the management of Health, Safety and Fire Safety at the Liverpool Women's NHS Foundation Trust.

Stewart is an advocate for promoting sensible health and safety management, Chair of the IOSH nominations committee who lead the association in the appointment of Board of Trustees and Board Committees members with the IOSH governance structure and committee member of the Northwest Healthcare Services Section, a long established part of the Manchester and North West IOSH Districts Branch. Stewart is also an active member of the Merseyside and Cheshire Construction Group and Construction Clients' Group.



Umesh DesaiDirector of Estates and Facilities, DeMontfort University

Qualified as a Chartered Building Surveyor, I have worked at De Montfort University in the Higher Education sector for over 31 years, working in the estates and property field. I am an experienced professional working at Director level on strategic and operational matters with a track record of managing large complex campus development programmes and a directorate of over 350 staff. I have experience in managing multi- site campuses, all aspects of estates matters from major capital development, maintenance, facilities management through to student accommodation, leisure, security and energy and sustainability. At DMU I am a member of a number of strategic boards that cut across all aspects of university business and held a position on the Board of Governors for a local Sixth Form College for 6 years. I am currently Chair of ProCon Leicestershire being a Board member since October 2018, whereby we connect professionals in property and construction in the Leicestershire area. In addition since July 2020, I have been elected to the role of Chair-Elect for the Association of University Directors of Estates (AUDE), the Higher Educations lead on all matters relating to estates and facilities. Born in Leicester, I have lived, studied and worked here all my life, I am very proud of the City and have been fortunate to have had the opportunity to directly influence major changes to the landscape at the University's City Centre Campus.



Grant FergusonInterim Director of Estates,
University of Edinburgh

A Chartered Engineer, Grant has enjoyed a career in Estate's related disciplines spanning almost 30 years split between the NHS and Higher Education sectors. Grant has been at the University of Edinburgh for 5 years and has been Interim Director of Estates since August 2020, his substantive role being Director of Estates Operations. His highlight in the past year has been the Estate's Team being awarded the University's Principal's Medal for its response and outstanding contribution during the Covid 19 pandemic.



Julian Gitsham Principal, Hassell

Julian is a Principal at international design practice Hassell working across architecture, landscape architecture, interior design and urban design - a rich multi-disciplinary mix of skills and perspectives that unlocks the economic, social and cultural value of projects. The practice combines creative design expertise with capabilities in strategy, research, technology and experience design, and regularly collaborate with experts and partners from further afield. A RIBA registered architect, Fellow of the Royal Society for Arts, and a Trustee of the Turn End Trust, Julian enjoys the process of leading, communicating, and educating in the design of places to be enjoyed by future generations. For more than 30 years, Julian has successfully delivered projects in all education sectors, particularly in the last 15 years in higher education, arts and culture, workplace, residential and masterplanning developments. He has completed over 20 award winning projects in the sector including at campuses throughout the UK and internationally in Cairo, Hong Kong, Melbourne and Perth. Recently Julian has been leading projects including the University of Glasgow Adam Smith Business School, University of Brighton Business School and University of Edinburgh Usher Institute for Population Health Sciences. Julian is a natural at networking with design partners and teams as well as people across industry. He has a way of uncovering a client's deeper needs, which results in more dynamic, exciting and responsive places.



Heather Kerrick BA MBA CMgr FCMI Assistant Director of Estates and Facilities, University of Huddersfield

Heather is a passionate Facilities Management professional with a career spanning over 30 years in the industry. Heather entered the world of facilities management in 1990 at Airedale NHS Trust, assisting in developing a successful bid to bring contracted out cleaning services back in house. This steep learning curve in developing and ultimately leading NHS services kept her working at the Trust for a further 17 years managing all aspects of Support Services and during which time she completed her MBA in Facilities Management at Sheffield Hallam University. Her research into the factors that influence patients' perceptions of cleanliness in hospital was published in the journal Facilities journal in 2007, the same year Heather stepped into the Private Sector. Working for Initial Healthcare as Operations Director for the Northern region and then for ISS Healthcare she returned to the NHS at Bradford Teaching Hospitals Trust in 2013, bring a wider and more commercial view of service delivery.

Heather moved to the University of Huddersfield at the beginning of 2015 to lead cleaning, security, campus support, car parking and sport services, taking on catering services in 2016. Over the last 6 and a half years all of these services have undergone reviews and service improvements to ensure they are student focused and efficient as well as being modernised and invested in to ensure staff have the best tools of the job and operate in good environment. In 2020 sport moved to Student Services and Heather has recently taken on carbon and energy management and sustainability.

In her time at Huddersfield Heather has focused on raising the profile and professionalism of Facilities Services and improving engagement with key stakeholders as well as increasing communications between colleagues in Property and Facilities Services. She has also become increasingly involved in early-stage development of large capital scheme to ensure that implications for facilities management are considered at the outset and built into plans and developments. She completed her CMI level 7 qualifications and became a Chartered Manager in 2017.



Daniel LadburyDirector of Estates and
Facilities, Sheffield Hallam
University

Group Director of Estates and Facilities at Sheffield Hallam University, AUDE Executive Committee Member and Chair of the AUDE North East Region. Daniel is a Chartered Civil Engineer and has over 20 years of experience in the property and construction industry. Daniel is constantly striving to challenge himself and support others to be their best and has a strong track record of innovation, collaboration, best practice, leadership and delivery in major programme delivery and improvement and organizational change. Daniel is also a passionate mountain biker and photographer and enjoys spending time with his beloved family. Daniel has worked at Sheffield Hallam University since February 2016 and is responsible for the management, maintenance and development of the University's estate which comprises 180,000m² of property in 90 buildings. Daniel's responsibilities include Facilities Management and Maintenance, Energy and Sustainability. Space Management and Timetabling and Capital Planning and Development. During his time to date at Sheffield Hallam, Daniel has engaged key stakeholders through the development and approval of a new campus plan which seeks to transform the university experience whilst delivering significant efficiencies in operation through reductions in space and led on the development and creation of the Hallam Alliance delivery framework; the first of its kind in the UK which is now developing the first suite of buildings under the University's campus plan. Daniel has guided his team through two major transformation projects and over the last year led the University's campus responses through the pandemic. Prior to joining Hallam. Daniel was Head of Capital Delivery at Sheffield City Council Daniel where he led on the delivery of the £350m Building Schools for the Future Programme, delivering the programme 1 year early with efficiencies of £80m whilst also transforming the Capital Delivery Service from a £1m per annum loss making function to delivering over 10% surplus in the space of just 2ears together with a 40% improvement in delivery performance through the development of a Programme Management Office. Daniel also designed and implemented the innovative Capital Delivery Partner supplchain framework which delivered significant value for money and increased the workflow for the council. Daniel started his career at Mott MacDonald Ltd as a Graduate Engineer and worked on a variety of schemes over ten years before being appointed Associate Director leading on the delivery of a portfolio of defense and education projects.



Keith LilleyDirector of Estates, Facilities
Management, University of
Sheffield

Keith Lilley took up the role of Director of Estates and Facilities Management at the University of Sheffield in September 2010.

Since joining the University, Keith has overseen a number of ambitious developments, including the 20,000 m2 Diamond building at the heart of the campus which opened in September 2015, and major improvements to the public realm around the central campus in a joint initiative with Sheffield City Council.

Keith has also played a key role in the acquisition of over 100 acres of land at the former Sheffield Business Park which will be developed out as an advanced manufacturing research campus, creating a hub for collaborative research. Factory 2050, the UK's first fully reconfigurable assembly and component manufacturing facility, has already been completed on the site.



Andy Nolan
Development and
Sustainability Director,
University of Nottingham and
Chair of AUDE Sustainability
Advisory Group

Andy Nolan is an experienced director-level professional with expertise in sustainable development, estate management, cities, governance, policy and strategy. With 20 years of experience working in both the private and public sector Andy has worked in both higher education and local government and has significant experience of multi-authority partnerships locally and nationally. He has worked for four universities (Bradford, Leeds Metropolitan (now Leeds Beckett), Sheffield and Nottingham) and is a Fellow of the EAUC and Chair of the Association of University Directors of Estates (AUDE) Sustainability Advisory Group. He has co-ordinated the UI Green Metric UK Network of participating universities. He is responsible for the University of Nottingham's development and capital programme as well as the sustainability strategy and delivery.



Dr Nigel OselandPsychologist, Workplace
Unlimited

Dr Nigel Oseland is a workplace strategist, change manager, environmental psychologist, researcher, international speaker and published author with 11 years research and 22 years consulting experience. He draws on his psychology background and his own research to advise occupiers on how to redefine their workstyles and rethink their space to create environments that enhance individual and organisational performance and deliver maximum value.

Nigel's consulting practice Workplace Unlimited specialises in strategic briefing and change management to help create workplaces that improve collaboration, enhance creativity, facilitate concentration, meet psychological needs and respond to changing organisational structures. He has advised corporate businesses, public sector bodies and educational institutions in the UK and worked with corporates throughout EMEA.

Nigel is also an active researcher, speaker, lecturer and author. His current topics of interest include psychological needs, psychoacoustics, productivity, personality factors, remote working, wellbeing and performance, biophilic design, and post occupancy evaluation. His latest book Beyond the Workplace Zoo: Humanising the Office is released late September. In addition, Nigel is the programme advisor for the Workplace Trends series of international conferences.



Sarah Randall-Paley Director of Finance, Lancaster University

Sarah is a Fellow of the Institute of Chartered Accountants in England and Wales (FCA). She qualified as a Chartered Accountant in London with KPMG and has been the Director of Finance at Lancaster University since 2009, responsible for both Finance and Procurement activities.

During Sarah's time in post, Lancaster has won the 'Outstanding Finance Team' in the Times Higher Education Awards (THELMAs) and been shortlisted for 'Outstanding Procurement Team'.

The Director of Finance reports to the Vice-Chancellor as accountable officer on all matters of finance and procurement and is responsible for:

- Contributing to the strategic direction of the University and corporate management;
- Maintaining financial administration and stewardship;
- Supporting and advising the University's committees;
- Supporting and advising budget holders and managers;
- Reporting externally and delivering services to staff, students, members of the public, stakeholders and other bodies.

Sarah has several national and regional roles including:

- Chair of the British Universities Finance Directors' Group (BUFDG).
- Member of the national TRAC Development Group (TDG). In 2018 was the Chair of a special cross-disciplinary project on Alternative Provision for undergraduate education on behalf of TDG.
- Chair UCAS Audit Committee.
- Governor of Lancaster Girls' Grammar School



Mark Swales FinstLM HE and Leadership Consultant and Facilitator

Mark has worked in the Higher Education Sector at a senior leadership level since 1988 with a strong focus on the development of estates and facilities management services. He has chaired four UK national sector bodies bringing together higher education professionals from a wide range of disciplines to share best practice and improve performance.

Mark has a Master Management degree and is a Graduate of the sectors Entrepreneurial Leaders Programme delivered in partnership with Oxford University's Siad Business School. Mark participated in the Common Purpose Programme and is a Graduate of the Work Foundation's Oxford Balliol College Runge Effective Leadership Development Programme.

Mark was Chief Estates and Facilities Officer for Sheffield Hallam University between 2010 and 2020, one of the largest providers of Higher Education in the United Kingdom where he was primarily responsible for its estates, facilities, commercial and academic timetabling functions. He has throughout his career held a strong interest in education and training and the difference this makes to students fulfilling their ambitions through all stages of their lives, whatever their starting point. Placing students are the heart of the education system is an approach he has followed, whether this is in the design of learning spaces or helping to shape the services which support learning and the wider student experience.

Mark was recently appointed Vice Chair of DN Colleges Group which is a dynamic education provider in South Yorkshire, Greater Lincolnshire and the Humber Region, focused on transforming its communities through learning. The Group is the largest provider of Higher Education in Further Education and one of the largest providers of apprenticeships in the United Kingdom. It has been awarded significant capital investment from the DfE as part of the £1.5Billion capital fund for FE which will be used to redevelop its North Lindsey Campus.

As Chair for the last three years of the International Summit on Innovative Learning Spaces, Mark has gained an international reputation for his knowledge of how changes in pedagogy are influencing both physical and digital learning space design. Attracting speakers and delegates from all five continents Mark has gained a global perspective of the challenges many directors of estate's and IT are facing. The pandemic has only added to the pace of these changes in a very dramatic way.

Being aware of the importance of work life balance in the sector, Mark delivered mindfulness training and practice into Sheffield Hallam University and continues to delivery sessions in Sheffield and for AUDE and other organisations. He is a keen walker, mountain biker and dancer as well as spending time with his family and grandchildren.



Helen Wallace Head of Space Management and Design, University of Exeter

Helen has been working as an architect, urban designer, community builder, workplace consultant, briefing specialist and change manager for over 20 years now although she can't quite believe it! She has been grappling the thorny issue of flexible working across central and local government, the commercial sector and more recently with Universities since 2006. Despite a recent break to attempt the significantly more challenging role of motherhood, she has been Head of Strategic Space at the University of Exeter since 2012 and been working with AUDE to develop their approach to Space Management for a number of years. During the first year of the pandemic, Helen acted as a project manager for the restart of the University and chaired a series of hugely popular national sessions for AUDE on the constantly changing considerations around space. Designing spaces to support the evolving pedagogical and technological changes in learning environments has been a key theme over recent years through continuous dialogue with the academic community.



Lisa Woods Head of Campus Services, University of Sheffield

Lisa has significant experience in managing large teams in both private and public sector organisations. After graduations from Loughborough University she worked for airport operator BAAplc in a variety of operational, change management and training roles across all the London airports. Whilst with BAA she gained her MBA from the University of Surrey. In 2000 Lisa moved with her family to the USA where she undertook volunteer work with the American Red cross and the Small Business Administration in Texas. Lisa joined the University of Sheffield in 2005 and currently managed a team of 400+ staff including staff from facilities, security, cleaning, transport, print, car parking, logistics, mail and performance venues. Outside of work Lisa is Chair of Yorkshire Netball and also a Director of Leeds Rhinos Netball.

After-dinner Speakers



Dervilla Mitchell CBE Deputy Chair of Arup Group

Dervilla is a Civil Engineer who has spent most of her working life in the UK where she has been involved in a wide range of building projects. A large part of her career has been involved with aviation, designing terminal buildings including T5 Heathrow, T2 Dublin and Abu Dhabi Midfield Terminal. Other notable projects include Portcullis House, Westminster, and the Athletes Village for London 2012.

Prior to her current role she was Executive Chair of the UK, India, Middle East and Africa Region of Arup. She has been active in championing diversity in the construction sector and supported initiatives to encourage young people to consider engineering as a career.

She is a member of the Prime Ministers Council for Science and Technology and chairs the National Engineering Policy Centre's decarbonising UK working group as well as contributing to a number of bodies active in advancing Net Zero ambitions in UK.



Mark Revnolds **Group Chief Executive**

Mark was appointed Mace's Group Chief Executive in January 2013, and has overseen the company's revenue growth from £1bn to £2bn in 2018. He has consistently championed change within our industry, driving innovation to improve service excellence, whilst ensuring Mace continues to be more productive, more efficient and a responsible company.

Mark gained his early experience in the commercial and aviation sectors. He was the Deputy Programme Director for the London 2012 Olympic and Paralympic Games.

Mark is currently a member of the Construction Leadership Council, sponsor for the People and Skills workstream, a Board Director for London First, the Northern Powerhouse Partnership and is a trustee of LandAid.



Alison Cox **Executive Director** Engineering and Technical Services

Alison can draw on over 25 years' experience in major construction projects and business leadership. A civil engineering graduate, she worked her way up through site engineering and project management roles and in 2020 joined SRM's board as Executive Director for Engineering and Technical Services. Alison will outline her career development which all began in 1989 when she undertook her first placement with us as an undergraduate.

Sessions

Session 1: Managing behaviour and change in HEI projects

Dr Nigel Oseland, Psychologist, Workplace Unlimited

Objectives

- 1. Understand the importance of change management in HEI projects
- 2. Recognise the different change models, their associated techniques and application
- 3. Be able to develop an appropriate change programme

Session synopsis

Even the best designed spaces will fail if the transition to them is not well managed, and the new space is not used as intended. In this hands-on session, psychologist Dr Oseland will focus on the theory and practice of change management relevant to HEI projects and spaces. Several change management models will be covered such as Lewin's freeze/unfreeze, Kübler-Ross, SCARF, ADKAR and Kotter's 8 steps. These models can be summarised as the 7Cs of Change: Credible coalition, Clarify vision, Create a crisis, Communication, Consult and Co-create, Celebrate success and Cement change. Change programmes and techniques will also be discussed, such as evaluating the readiness for change and how to overcome barriers to change. Whilst design alone will not instigate change, it can certainly be used to nudge required behaviours.

Session 2: Managing a large estate

Keith Lilley, Director of Estates, Facilities Management, University of Sheffield

Objectives

- To provide an understanding of the challenges
- 2. To share the business change journey
- Underline the importance on a 'One Team' approach

Session synopsis

This session highlights and reflects on the challenges, risks and opportunities of managing a large and diverse University Estate and large teams. Key themes include sharing experiences from along the journey of business change, people strategy, compliance, business resilience, financial control and the emerging pathway to net zero.

Session 3: The sustainable campus

Andy Nolan, Development and Sustainability Director, University of Nottingham and Chair of AUDE Sustainability Advisory Group

Objectives

- 1. Show why sustainability is good business and how you right make the case for change
- 2. Help identify the scope and where the key interventions issues are at your organisation
- 3. The role of estates professionals in sustainability and how AUDE can help you succeed

Session synopsis

Sustainability is no longer an option. Universities are expected to demonstrate their commitment to the global challenges outlined in the United Nations Sustainable Development Goals – in both what they do and how they do it. They're increasingly committed to sustainability and this session will explore what that means for university estates – what are the challenges and opportunities we all face? In this interactive session participants will consider what leaders in estates functions should be thinking about – what does sustainability mean for them – and what does it mean for you now and in the future. What will you need to do differently in the future? We'll cover resource use, the circular economy, greenhouse gas emissions, climate adaptation, water management and biodiversity – all within the context of University core business – teaching, research, commercial activity and, of course, student experience.

Session 4: Strategic FM in a changing environment

Lucy Black MSc FIWFM, Head of Facilities and Student Accommodation, University of Plymouth and Chair AUDE Strategic Facilities Management Group Heather Kerrick BA MBA CMgr FCMI, Assistant Director of Estates and Facilities, University of Huddersfield Lisa Woods, Head of Campus Services, University of Sheffield

Objectives

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Our aim with this session is to explore the intersectionality of strategic FM within the boundaries of estates and facilities management. To do this we will be sharing best practice and lessons learned around the following 3 objectives.

- 1. Understand the benefits of early FM inclusion in project design and development
- 2. Interpret how FM people management skills can benefit your sector of the business particularly in relation to equality, diversity and inclusion
- Appreciate the critical part FM plays in the Student Experience

Strategic FM is increasingly a topic of discussion at the top tables across Higher Education institutions currently. From increasing value for money, delivering business benefits for our students and harnessing the people management expertise amongst its workforce, there has never been a more important time for Facilities Management.

Course delegates should be comfortable to use technology to participate in the session.

Session 5: Bottom Up or Top Down - Developing a Business Focused Estates Strategy

Grant Ferguson, Interim Director of Estates, University of Edinburgh

Objectives

- 1. Identifying key stakeholders
- 2. Engaging in persuading stakeholders
- 3. Delivering and driving success

Session synopsis

All university estates require a masterplan for spatial organisation and strategic development as well as a delivery plan articulated through an estates strategy document. Estates strategies and their success are best measured on an ongoing basis but analysis of success is most comprehensively tested at the end of the five year plan. This session will look at the approaches that can be used to develop a successful strategy, how these can be applied in terms of meeting the business need and how best an estates department can develop one which is sustainable, owned by the academic community, and contributes to the overarching strategy of the University.

Session 6: Institutional risks – how Directors of Estates/Facilities and Finance can work together to manage these

Facilities V Finance - Friend or Foe?

Andrew Burgess, Director of Estates, Facilities and Commercial Services, Lancaster University Sarah Randall-Paley, Director of Finance, Lancaster University

Objectives

- 1. To highlight with examples the core areas where Facilities and Finance need to work in partnership to meet the corporate needs of the University
- 2. To identify leadership approaches for Facilities teams to increase their chances of success
- 3. To provide examples that allow delegates to reflect on how they may need to change or improve their approach

Session synopsis

This session will identify different areas of collaboration/combat? Between Facilities and Finance.

The budget for the estate is the second highest after staff salaries; a capital programme will present both risk and opportunities.

Facilities are subject to extensive audit and potential for fraud risk given all of the contracts they oversee.

The estate requires constant reactive and planned maintenance, much of which the end user does not experience until things go wrong. Some of this is literally underground and out of sight.

The increasing drive for efficiency and value for money.

The increasing requirement to seek income from Estate Commercial activity will increase as financial sustainability continues to be a challenge.

Tensions about the rising costs for students and accommodation charges.

The carbon agenda - creating good investment cases and avoiding green wash.

All of the above will challenge relationships.....

A series of examples will draw on the experiences of the Lancaster Director of Finance, Sarah Randall-Paley and the Director of Estates, Facilities and Commercial Services, Andrew Burgess on how they work together and their teams. The session will be interactive with plenty of opportunities for delegates to consider and reflect on the examples and relate to their own experiences and add to experiential learning.

Session 7: What does Health & Safety Compliance mean for a Director of Estates?

Stewart Crowe, Assistant Director and lead for Health and Safety at Liverpool University Hospital NHS Foundation Trust

Objectives

- 1. An appreciation and understanding of health and safety legal framework, and methodology and approach to statutory maintenance obligations based on risk
- 2. The influence and leadership an effective client can play in construction
- 3. An appreciation and understanding HSE enforcement management model and sentencing guidance

Session synopsis

Directors of Estates will have responsibility for overseeing the management of all aspects of the hard and soft facilities management; major capitals scheme; minor works; refurbishments; space management; estates maintenance; security; business continuity; cleaning; building management (porters); environmental sustainability and property assets; commercial and retail; sport; student residences and facility services.

Assessing risk and compliance with health and safety law can be relatively straightforward though in some circumstances application can be extremely complex. To provide aspiring Directors of Estates with the confidence they are doing the right thing the session will take delegates on a journey so they have an appreciation and understanding of the health and safety legal framework to help identify specific legal obligations within the content of estates management.

To contextualise health and safety compliance particularly relevant to the role of Director of Estates, two aspects of health and safety management will be explored in more detail modelled around a compliance maturity model. This will focus on statutory maintenance obligations within Estates Management and the Construction (Design and Management) Regulations in relation to new build, refurbishment and building development projects.

The first part of the session will focus on how you, as Director of Estates, and head of the procurement chain can have a major influence on project standards, culture and improve health and safety in the industry and across the sector. The discussion will look at the importance of the role of the client and suggest some key commitments that can be made between the University and the supply chain that can significantly set the standards for health and safety. The conversation will touch on new challenges in the construction industry and explore how Directors of Estates can lead change to proactively influence how these challenges are approached.

After practical completion of a new build the management of the assets will be continual challenge. The second element of the session will explore estates statutory maintenance inspection and testing obligations and analyse legislation to identify what the specified statutory requirements are. Then analysing how we can challenge established and interpretative standards for optimum testing, inspection programmes that provide the highest level of safety and reliability. Utilising the compliance maturity model investigate the hidden element of compliance, the inspection and testing report recommendations and how this information is to be managed with budgetary pressures.

Future Directors of Estates will gain an understanding of the importance of internal and external auditing and continual monitoring and review of their systems. We will questioning whether you can truly be 100% complaint or is it assurance you desire through effective risk management of your estate.

And, finally provide an overview of the of HSE Enforcement Management Model which stipulates the principles used by the HSE when determining what enforcement action to take in response to breaches of health and safety legislation before anything goes wrong and the application and impact of the sentencing guidance for prosecuted for offences under the Health and Safety at Work Act 1974 and associated regulations.

Session 8: Influencing the board working with senior teams - Nominating student accommodation rooms

Umesh Desai, Director of Estates and Facilities, DeMontfort University

Objectives

- 1. Develop a SWOT analysis to identify strength, weaknesses, opportunities and threats in continuing with the guaranteed approach.
- 2. Should Board Papers favour a Student Experience and Recruitment opportunity emphasis or focus more on reducing financial risk exposure?
- 3. Can we identify other models or approaches that could be taken in a post pandemic era that minimise financial exposure to university X their current arrangements?

Session synopsis

The COVID pandemic has created many challenges for the university sector. The last two years has seen a sector change in how students behave in selecting a university, student accommodation is a major factor. How does an Estates Director that relies on securing rooms through private accommodation providers, via soft nomination agreements balance the needs of key senior stakeholders and present their Boards with a balanced approach, that provides a "guarantee" message whilst minimising financial exposure through void penalties, and maintaining compliance with regulatory bodies such as Office for Students and Consumer Rights Act?

Session 9: Organisational story telling - performance management

Daniel Ladbury, Director of Estates and Facilities, Sheffield Hallam University

Objectives

- 1. To share lessons learned on how to successfully deliver difficult organisational messages
- 2. To provide delegates with the opportunity to consider some of their greatest challenges and how the learnings and tools from the session can help them to overcome these
- 3. To provide a range of tools that delegates can use in their own work to enhance their impact in engaging others with difficult messages

Session synopsis

Universities are complex organisations with many competing demands and priorities. As Estates Professionals, we have demanding jobs and deal with significant issues and risks which can have a major impact on the organisation.

With the pressures of increasingly constrained finances, ageing estates, the need to address Climate Change and more demanding student, staff and partner expectations Estates Professionals are increasingly required to be at the forefront of driving organisational change and delivering difficult messages to colleagues and stakeholders to improve team and organisational performance. The role of the Senior Estates professional is a difficult one, as they are often required to act as the translator between the senior and academic functions of the university and the technical professional functions of the estates team.

Communicating a compelling message that galvanises action is critical to success. The value and impact of the estate is not always readily understood and key stakeholders can find it difficult to engage with the issues and challenges faced by estates profess ionals such as maintenance pressures, funding challenges, why buildings are expensive and take so long to create or change. How many of us have been asked in August to create a new facility or find more space for September and found it hard to make colleagues understand why this is not possible?

As we embark on major changes to transform how our campuses and teams operate we need to galvanise colleagues and stakeholders behind the challenges and opportunities presented by bringing these to life through stories in a way that users can understand, engage with and support in order to drive the performance of our assets and teams.

This session will share key learnings by the speaker on organisational story-telling and provide delegates with a range of tools on how to construct a compelling narrative and message.

Delegates will leave the session with a range of tools and techniques intended to help them tackle issues in new and creative ways.

Session 10: Planning for the Next Generation University

Professor Kathleen Armour, Pro-Vice-Chancellor (Education), University of Birmingham

Objectives

- 1. To learn from the (pre-pandemic) 'Futures' literature and its implications for Next Generation Universities
- 2. To identify what remains relevant and what has changed (post-pandemic)
- 3. To agree on the 'safe bets' in planning for the Next Generation University

Session synopsis

In the first part of this session, I will summarise a review of the sprawling 'Futures' predictions literature that I conducted in 2019. I will outline the key areas of interest for universities including: the impact of the 4th Industrial Revolution; changing population demographics; renewed interest in lifelong learning; the proliferation of knowledge producers; the understanding that students as learners will be different and increasingly diverse, and that teaching must also change; the growing influence of employers on the curriculum, and issues around value for money/cost.

In the second part of the session, and drawing on your experience, we will consider what has changed following Covid; for example, issues that have become more or less important and whether anything is missing. Given the timelines involved in planning for the design and functioning of physical and digital campuses, it is clear that we will need to agree on some of these future predications as the basis of our planning and before we invest. This knowledge will become even more critical over the next period as we experience growing pressures on university budgets. Moreover, as we have learnt in the last 18 months, things can change!

In the final part of the session, we will attempt to agree some 'safe-bets' to support our efforts to plan and prepare for the 'Next Generation' University. For each area of agreement, we will work through the benefits and challenges, and the implications for different functions and activities

Session 11: Building heart - Creating places for an ever changing landscape

Helen Wallace, Head of Space Management and Design, University of Exeter **Julian Gitsham**, Principal, Hassell

Objectives

- 1. Reflect on the role of custodian of a University Estate and what the key considerations are to ensure that we create Estates that are fit for a changing future
- 2. Consider how our stakeholders perceive and value the spaces we create and how that impacts on our approach to their development
- 3. Work together on development of briefs that reflect the long term needs of an estate, support flexible models of use while building community

Session synopsis

We are increasing being asked to support models of teaching, researching and working that are seemingly in a constant state of flux and the rate of change has never felt greater. In reality "new ways of working" have always been around with social, technological and cultural changes influencing the demands on our spaces from before a digger touches the ground and throughout the lives of our buildings. Even the concept of flexible working is really over 20 years old.

Building spaces is simply not enough, we need to create places that are magnetic, support our communities and capable of adapting to shifts in behaviour and usage.

During this session we will explore some of the factors we need to consider and perspectives that require our empathy while briefing and commissioning places that are fit for the future. We will look at examples of spaces, buildings and campuses that have been successful in these aims and try to unpack their characteristics so we can begin to understand how to be true custodians of thriving and productive estates

Session 12: The Mindful Leader

Mark Swales, FINSTLM, HE and Leadership Consultant

Objectives

- 1. Give you an understanding of the concepts of mindfulness and how this can be applied in the workplace with your teams.
- 2. Equip you with some proactive practical techniques to help build your personal resilience including stress reduction (there will be an opportunity to try some of these).
- 3. Describe ways in which you can explore the topic further after the session so you can build your personal and team resilience.

Session synopsis

Mark has been delivering mindfulness training and coaching since 2015 when he first introduced it into Sheffield Hallam University and the Facilities Directorate. He has delivered Mindfulness Sessions as part of the University's leadership development programs, as well as at AUDE Summer Schools and at a range of national conferences and events.

During the Pandemic Mark along with four other Mindfulness Coaches in Sheffield delivered twice weekly mindfulness sessions on line to over 80 attendees as well as delivering a number of mindfulness five week courses on line.

During this session Mark will share with you how mindfulness can support leaders in the Workplace and how it can have a positive impact on peoples outlook in both their professional and personal lives. This is an interactive session and Mark will provide a range of materials after the residential for those delegates who wish to explore mindfulness further.

Session 13: Presenting with impact

Louisa Clarke, Verbal Communications Specialist

Objectives

- 1. Speak with clarity and conviction
- 2. Channel your nerves positively to create maximum impact
- 3. Ensure you hold the attention of your audience with confidence and credibility

Session synopsis

This concise and practical session has been designed to support those who have experience or are new to making presentations. The session focuses on honing specific skills to increase the power of your communication. Using exercises adapted from work with actors, individuals will learn how to hold the attention of their audience, and how to more effectively engage with them.

A highly practical session, you will -

- Develop an understanding of how your body language and tone of voice affect your ability to make an impact as a speaker
- Find an open and present manner of communication conveying authority and confidence
- Ensure your key message not only reaches your listener, but carries weight and truly lands

Drawing on techniques used in actor voice training, the exercises used throughout this course have been further developed for the commercial sector.

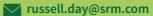
Delegate List

Name	Job Title	Institution
James Adshead	Capital Manager	Newcastle University
Peter Brinkley	Deputy Director	University of Surrey
Alastair Brock	EFCD Head of Health, Safety & Compliance	Manchester Metropolitan University
Sioned Cash	Head of Sales and Service	University of Warwick
Michelle Chodyniecki	Assistant Director of Estates & Campus Services	University of Northampton
Steven Cox	Head of Estates Development	Bournemouth University
Tim Cronin	Capital Projects Officer	University College Cork
Nicola Duffy	Head of Business Services	Lancaster University
Jonathon Face	Assistant Director of Estates	Manchester Metropolitan University
James Hale	Senior Capital Projects Manager	University of Nottingham
Adam Hamilton	Senior Electrical Engineer	Newcastle University
David Harty	Head of Operations	University of Glasgow
Ryan Hill	Zone Maintenance Manager	University of York
Neil Hornsey	Project Manager	University of Surrey
Ross Hughes	Project Manager	University of Derby
John Iveson	Assistant Director	Queen Mary University of London
Wayne Jones	Head of Estates Management	Bangor University
Colm Lavery	Head of Estates Development	Queen's University Belfast
David McClory	Head of Estate Planning and Performance	Nottingham Trent University
Chris Meloy	Campus Manager	University of Westminster
Alison Morrison	Director of Estates	Glasgow Caledonian University
Robert Payne	Senior Building Surveyor	Newcastle University
Brett Plant	Systems and Digital Information Manager	University of Warwick
Sharon Richardson	Senior Estate Planner	Newcastle University
Jane Robson	Assistant Director Estates Operations	Durham University
Gavin Scott	Environment Manager	University of Nottingham
Richard Smith	Head of Environmental Sustainability	University of Manchester
Geraldine Ward	Senior Asset Manager	University of Glasgow
Harriet Waters	Head of Environmental Sustainability	University of Oxford
Dan Watkin	Performance & Development Manager	University of Birmingham



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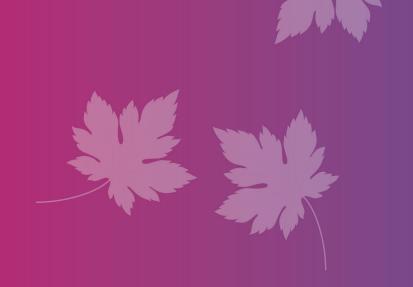












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