

# Strategic Plan 2010-2015

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# Section One: Introduction

The Strategic Plan (2010-2015) for the Higher Education Liaison Officers Association sets out our mission, our vision and our underpinning values for the period up to 2015. We have deliberately set out a vision that exceeds the standard terms of office for elected committee members because we believe that the Association needs a longer term, sustainable vision.

Our vision is divided into five cross-cutting themes which influence the direction of the strategic planning of the Association – they are five themes which the Executive and UK Committee (UKC) of the Association are committed to. From these themes specific aims and objectives have been developed which reflect the mission and vision of the Association. A series of performance measures have also been identified which will be used to assess progress over the lifetime of this strategic plan.

There are well-documented challenges ahead for the Higher Education (HE) sector. We need to use the opportunity these challenges bring to ensure that HELOA becomes a strong and resilient Association, that our members are well trained, highly developed and valued members of their Institutions, and that the Association finds a voice for itself that is valued and respected and one that contributes pro-actively to the future of Higher Education in the UK.

The decisions that we make, the management and governance principals that we apply, and the direction that we set for the Association, have to be the right decisions - and the UKC, the members you have elected to lead the Association, have to take those decisions quickly, decisively and sensibly.

We face these challenges from a position of relative strength, but we also recognise that the spread of our influence needs to be further extended and our purpose and meaning to our members needs to be better articulated.

The Association has grown, developed and changed over the last decade, and we believe that it can and will continue to do so. We believe the reason for this confidence is deeply embedded in the 'can-do' culture and ethos of an Association which values the contribution that all members make to its success. The challenges ahead also bring opportunities to an Association which has been successful in identifying and responding to such opportunities in the past.

As always, we welcome feedback from all members of the Association.



Liam Owens  
**UK Chair: June 2010**

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# Section Two: Executive Summary

The strategic plan for the Association is divided into five cross-cutting themes against which specific aims and objectives have been developed. They are summarised as:

## Stronger Groups with larger, more diverse membership

- For HELOA to be an association that exists to support its members.
- Investing time and resources into supporting the Association at Group level. The Vice-Chair for Group Development will work with Groups to develop frameworks for Group structure, governance and activities with a focus on organisational consistency across all nine Groups.
- For Group activity to contribute to the vision of HELOA and resources will follow Groups who are able to plan for such activity. Training, partnerships and communications will be key aspects of Group activity.

## Enhanced profile within the sector

- For HELOA to be a valued and respected partner of other associations, organisations, statutory bodies and government and for partnerships to be of clear strategic importance to the Association.
- HELOA will have a greater media profile and be a stronger voice in the debate about Higher Education in this country.
- Enhance external publications to raise brand awareness and reflect the ambition and scope of the Association.
- Review current partnerships within the Association and give consideration to a range of potential partnerships with other agencies, groups and associations and to review the benefits of such partnerships to our members.

## A leader in training, personal and professional development

- Review of how training is delivered right across the Association – on a local and national level. We want to develop a greater understanding of the professional training needs of our entire membership and to also ensure that we are investing the personal and professional experience for members to be the future leaders of the Association.

## Effective governance and internal communications

- Review of the Constitution and internal processes of the Association in relation to the needs of the membership and to ensure that the Association can be effectively governed to realise the ambition of the vision for HELOA.
- Enhance internal communications to ensure that all membership are aware of the strategic direction of the Association and that the membership are engaged with HELOA decision making throughout the committee cycles of the Association.

## Effective service delivery

- In challenging economic times, the Executive will do all that we can to ensure that the Association provides value for money for members and maintain the overall HELOA budget in order to function effectively. It is down to the UK Committee to ensure that membership to the Association has tangible benefits for Institutions as well as individuals.
- The Executive and UK Committee must also ensure that the Association has the ability to adapt to change during these challenging times.

**Alongside these themes are the Mission, Vision and underpinning Values of the Association. These are designed to give a clear sense of direction to the Association; to our members, to our home Institutions and to stakeholders.**

# Section Three:

## Linking the Strategic Plan to our Work and Our Mission:

### Our Purpose:

The Objectives of HELOA, as set out in our governing Constitution are:

- a) To promote entry to all sectors of Higher Education.
- b) To have concern for the nature and quality of the information and counselling given in the United Kingdom either directly, or indirectly to all potential students.


### Our Mission Statement:

HELOA will be one of the foremost, professional, member-led Information Advice and Guidance (IAG) Associations in the sector, collaborating closely with other Associations and Agencies and will make a significant contribution to the debate about Higher Education in the UK. With well developed collaborative working practices, HELOA will have an engaged and active member body who are well trained, professional and who are sector leaders in quality IAG.

### Our Vision Statement:

By 2015, HELOA will be one of the leading IAG focussed associations in the Higher Education Sector. The loyalty of existing members will be retained and developed and our membership base will continue to accurately reflect the sector. Our nine UK groups will be stronger and more consistent as our membership develops.

The nine Groups across the UK form the basis of the main activity within the Association. Within a framework of group activity, members will have an opportunity to network, share best practice and foster an understanding and appreciation of each others' work which will enable them to:

-  Promote the potential benefits of Higher Education to prospective students across all ages, irrespective of educational, cultural and social background.

- Work collectively and with other agencies to ensure access to information and guidance by as wide as possible a range of potential students, their families and advisers, in addition to fostering equality of opportunity by providing such information and guidance free to all.

**The work of the Association overlaps with, or relies on, the work of other organisations and stakeholders. In order for HELOA to contribute to the wider debate about Higher Education in the UK we will:**

- Foster meaningful and beneficial links with other organisations and bodies working in related areas in order to increase our influence and also provide service to members.
- Promote a greater appreciation of the nature and value of the work undertaken by HELOA members both within Higher Education and in the wider community.
- Through having a strong collective voice, establish recognition as a key institutional and sector voice in discussions and decision making about IAG.

**With members at the very heart of HELOA activity, a well informed, highly developed and competent workforce is crucial to the success of the Association. At the very core of this aim is the need for the Association to understand its membership. By 2015, HELOA will:**

- Provide varied levels of cost effective training and development opportunities at local and national levels.
- Provide training and development which is responsive to member needs and which addresses that need at differing points on the career ladder.
- Recognise future potential training and development needs by being aware of developments within the sector which have implications for members.
- Establish and support information networks through which members may share information, experience and good practice.

## As a result members will:

- Enable and assist prospective HE students to make well-informed personal choices of HE courses and institutions on the basis of quality information and guidance.
- Provide this with honesty and impartiality whilst respecting diversity of institutional missions, and to foster inter-institutional cooperation in pursuing these aims

**HELOA will continue to grow as a complex Association made up of members from across the sector with their own Institutional values and visions. Strong and effective leadership and governance is fundamental, as is effectively communicating the benefits of membership to our members. We will:**

- Provide clear information to members about the strategic and operational objectives of the Association on an annual basis.
- Regularly review our governing constitution to ensure that it is fit for purpose and is being properly upheld.
- Ensure that governance decisions made at Executive and UK Committee level are translated into equivalent action at Group level.
- Ensure that all members of committee, whether at Executive, UK or Group level are honest, open and transparent about decisions that are made and that they are held accountable for those decisions by all members.
- Ensure that there are effective mechanisms for internal communication across the Association.

**The Association exists to serve its paying members on the basis of the aims set out above. It has a duty and responsibility to provide an effective service for its members and to ensure that all services provide value for money. HELOA will:**

- Ensure that prudent financial decisions are made to protect the financial integrity of the Association and its long-term financial health.
- Ensure that membership of the Association provides value for money for members and that service delivery is prudent and cost effective.
- Provide an effective and efficient administrative hub that serves the committee and the membership, and provides operational assistance at all levels of the Association.
- Establish and support an environment which allows the business of the Association to operate successfully, react to changes in the sector and uphold decision making in the best interests of the wider Association.

## Our Values:

### Professional:

We will be professional and courteous in our actions and communications, collaborative in our approach to working with stakeholders and each other and supportive of our members who we place at the heart of our business. We will take a collaborative approach to the management of, and the decision making in, our Association.

### Communicate:

We will communicate effectively with our members and our external stakeholders.

### Value:

We will value our people and their contribution to the Association and recognise that our people are our Association. We will respect and value diversity and the life benefits that learning through higher education can bring to individuals and communities.

### Integrity:

We will act with integrity, openness, transparency and honesty in all of our decisions and interactions. Professional integrity will stand alongside our impartiality in our giving of Information, Advice and Guidance.

### Collaborative:

We will work collaboratively with stakeholders, partners and institutions and take a collaborative approach in the management and decision making in our Association.

# Section Four: The Aims & Objectives of Our Strategic Plan:

## Our Aims and Objectives:

Against each of the five cross-cutting themes, a series of aims and objectives have been set.

Following the objectives, there is a section of the strategic plan dedicated to Measuring Success. Within that section, we have illustrated how the objectives of that theme link to other developmental work being undertaken by the Executive Committee and also sets out a series of Performance Measures against which we can monitor our progress.

Section 6 of this strategic plan sets out how the objectives below are 'operationalised'. Specific targets are not given in this plan, but will be set out in our annual operating plans.

## THEME A: Strong Groups with larger more diverse membership

### Our Aims:

- For HELOA to be a member-centric Association that exists to support and serve its members at group level.
- For the nine HELOA groups to retain their individual flair but for activity and governance to be consistent across the groups and that members are able to access the same level of service from the Association regardless of their group location. We will strike a balance of local autonomy and central consistency.
- For the Association to encompass the broadest possible membership from across the sector in order for members to grow and develop good practice together.

## Our Objectives:

- To develop a consistent Framework for Group Structures which will support groups in establishing local committees to deliver the work of the Association at Group level and ensure that local committee members are supported in their roles.
- To develop a consistent framework for the Group Governance document which will ensure that decision making, governance and member involvement at Group level is consistent across the UK and consistent with the Constitution of the Association.
- To develop a consistent Framework for Group Activities document which will guide the development of Group activities and ensure that Groups are fully supported in their delivery of activities and that such activities, in turn, support the ambitious vision plan of the Association.
- To develop guidelines for Group meeting dates to harmonise with committee business across the Association and ensure that Association business works its way through committee cycle in a timely way and that decision making is transparent and effectively communicated across the Association.
- To improve the flow of reporting and information between Executive Committee, UK Committee and Groups to ensure that all information is available in reports made available to members and through inclusion in annual reports for AGM.
- To implement robust financial planning processes at Group level to ensure that Association funds are being appropriately used to deliver key activity on behalf of the Association, that Group Accounts are appropriately managed and audited and that where Groups charge fees to deliver additional services to their members, this is appropriately managed in order to reduce risk to the overall financial integrity of the Association.
- To ensure that all activity at Group level is adequately planned and resourced by engaging proactively with Corporate members and that Corporate members (and their Institutions) are informed about the work of the Association.
- To engage and attract a wider range of Membership through specific projects to engage under-represented areas of the sector (for example colleagues in FE Colleges). By creating wider reaching Group Committees, support will be provided for Group Chairs and colleagues to engage with these audiences, secure increased and diverse membership and provide an important second income stream for the Association.
- To see engagement with partner organisations developed through the Group networks which reflects the partnerships being developed by the Association centrally.

- To develop training and networking activity at Group level that reflects the national model of training and networking and ensure that every meeting contains at least one training opportunity and that local training officers have access to the national training organiser to develop networks and resources.
- Ensure that all materials and communications are reflective of our brand, consistent with our values and help the Association meet its overall aims by ensuring that our brand values are evident in our tone, our messages and in the leadership of the Association.

## Measuring Our Success:

### Links to other VISION 2015 Documents

- [Positioning Statements](#)
- [Management & Governance Documents](#)
- [Branding Document](#)

### Performance Measures

- [Maintain Strong Membership](#)
- [Increase Associate Membership](#)
- [Consistent Group Activities & Messages](#)
- [Financial Outturn](#)

## THEME B: Enhanced profile within the sector

### Our Aims:

- For HELOA to be a valued and respected partner of other associations, organisations, statutory bodies and government, and for partnerships to be of clear strategic importance to the Association.
- For HELOA to have a greater sector profile and influence and be a stronger voice in the debate about Higher Education in this country.

### Our Objectives:

- To develop and approve a set of positioning statements that set out: Our Mission, Our Vision and Our Values. These will be communicated to our members and will form the basis of our messages to stakeholders and partners.
- To enhance our external publications to raise brand awareness and reflect the ambition and scope of the Association.
- To develop an Annual Review which summarises the work of the Association which is made available to members, corporate institutions, stakeholders and partners.
- To regularly revisit our Code of Practice and where appropriate seek external recognition for this area of our work.
- To develop a range of potential partnerships with other agencies, groups and associations and to regularly review the benefits of such partnerships to our members.
- To seek opportunities to influence key sector stakeholders and take opportunities to enhance our profile by taking an active role in steering groups and committees.
- To seek opportunities to gain media and press coverage and to communicate positive news and views from the Association and our membership.
- To develop specific web site content and functionality that reflects the brand values and ambition of the Association.

## Measuring Our Success:

### Links to other VISION 2015 Documents

- [Positioning Statements](#)
- [Management & Governance Document](#)
- [Branding Document](#)

### Performance Measures

- [Media coverage](#)
- [Improved web presence](#)
- [Enhanced partnerships](#)
- [Positions of influence on committees and steering groups](#)

## THEME C: A leader in training, personal and professional development

### Our Aims:

- [For HELOA to develop a greater understanding of the professional training needs of our entire membership.](#)
- [To ensure that the Association is investing in the personal and professional experience for members to be the future leaders of the Association.](#)

### Our Objectives:

- [To continually review and enhance the content of Annual Conference to ensure that training is timely, relevant and varied for members.](#)
- [To provide varied levels of cost effective training and development opportunities at local and national levels and to ensure that all training provides value for members and value for money.](#)

- To develop a specific and detailed business plan to ensure that the training provision across the Association is providing sufficient revenue to cover the costs of delivering high quality training and that any generated surplus raised by this area of our work is reinvested specifically into further developing training at national and Group level.
- To provide training and development which is responsive to member needs and which addresses that need at differing points on the career ladder, including beginners advanced practitioners and in-year training opportunities.
- To recognise future potential training and development needs by being aware of developments within the sector which have implications for members.
- To establish and support information networks through which members may share information, experience and good practice and to create opportunities for members to meet and share best practice ideas in a professional yet challenging environment.
- To consider ways in which training provision within the Association can support the development of committee cycles and the management of the Association as well as providing training and development plans for those who wish to consider stepping into committee positions in the near and middle future.
- To ensure that all training is regularly reviewed and that evaluations are shared with members in a timely and transparent manner.

## Measuring Our Success:

### Links to other VISION 2015 Documents

- [Positioning Statements](#)
- [Management & Governance Document](#)
- [Branding Document](#)

### Performance Measures

- [Financial outturn](#)
- [External benchmarking & awards](#)
- [Review of training reports](#)
- [Evaluation](#)
- [Membership engagement](#)

## THEME D: Effective governance and internal communications

### Our Aims:

- For HELOA to provide clear information on management and governance of the Association and that distinctions between those things are communicated to the Membership and that appropriate documentation, policies and procedures are in place to safeguard the long-term future and integrity of the Association.
- For HELOA to enhance internal communications to ensure that all members are aware of the strategic direction of the Association and that the membership are engaged with HELOA decision making throughout the committee cycles of the Association.

### Our Objectives:

- To provide clear information to members about the strategic and operational objectives of the Association on an annual basis.
- To regularly review our governing constitution to ensure that it is fit for purpose and is being properly upheld.
- To ensure that governance decisions made at Executive and UK Committee level are translated into equivalent action at Group level.
- To ensure that all members of committee, whether at Executive, UK or Group level are honest, open and transparent about decisions that are made and that they are held accountable for those decisions by all members.
- To develop a range of management policies and procedures which ensure the effective running of the Association on a day-to-day basis. These will include:
  - a) Human Resources Policy
  - b) Risk Management Policy
  - c) Financial Policies & Procedures
- To ensure that there are effective mechanisms for internal communication across the Association.
- To ensure that Administration is appropriately mapped across the Association and that members are able to easily access information relating to the Association.

- To develop the members area of the website to provide a service based on member need and behaviour.
- To provide regular and relevant training to members of the UK Committee to ensure that they are supported in the delivery of strategic and operational objectives.

## Measuring Our Success:

### Links to other VISION 2015 Documents

- [Positioning Statements](#)
- [Management & Governance Document](#)
- [Constitution](#)
- [Branding Document](#)

### Performance Measures

- [Membership engagement](#)
- [Monitoring of activity on member website](#)
- [Effective group activity & governance](#)

## THEME E: Effective Service Delivery

### Our Aims:

- For HELOA to ensure that the Association provides value for money for members and maintain the overall HELOA budget in order to function effectively.
- For the UK Committee to ensure that membership to the Association has tangible benefits for Institutions as well as individuals.
- For HELOA to ensure that functions of the Association are executed in a timely, efficient and effective manner that supports that professional values of the Association.

## Our Objectives:

- To ensure that prudent financial decisions are made to protect the financial integrity of the Association and its long-term financial health.
- To ensure that membership of the Association provides value for money for members and that service delivery is prudent and cost effective.
- To provide an effective and efficient administrative hub that serves both the committee and membership, and provides operational assistance at all levels within the Association.
- To establish and support an environment which allows the business of the Association to operate successfully, react to changes in the sector and uphold decision making in the best interests of the wider Association.

## Measuring Our Success:

### Links to other VISION 2015 Documents

- [Positioning Statements](#)
- [Management & Governance Document](#)
- [Branding Document](#)
- [Constitution](#)
- [Operational Handbooks](#)

### Performance Measures

- [Annual budget & auditing of accounts](#)
- [Membership survey](#)
- [Group Chair feedback](#)
- [Financial outturn](#)

# Section Five: Context:

## Our Past

As Higher Education expanded in the 1970s, schools liaison began to move from a reactive role, responding to course requests, to a more proactive activity with school visits by university staff increasing. It was at this time Bob Alexander from the University of Bradford decided to create a northern universities schools liaison group, the M62 Group. By the 1980s more institutions were interested in sharing information and good practice, and this group grew into the national Schools Liaison Officers Group, SLOG.

By 1987 the group had expanded to over 70 members and SLOG decided to organise the first ever free HE fair. Prior to this students had been asked to pay a fee. The fair, held in June 1988, started the HE fair programme that we all attend today.

Regional representation was set up with the regional chairs making up a National Committee. Priorities for this initial period centred on formalising the HE fair programme and building relationships with the many fair organisers around at that time. By 1996 UCAS had taken over the organisation of many of the HE fairs and HELOA contributed to the planning and organisation of many of the fairs.

By 2000 HELOA was building its profile externally, which involved working with careers advisers and groups such as ISCO and CRAC and resulted in the National Chair, Josie Hurd, being invited to meet the then HE minister, Bill Rammell, and with an opportunity for the Association to input into part of the 14–19 curriculum changes.

The HELOA Office was set up in 2001, to support the work of the Association, and currently is staffed by two part-time administrators.

In 2008 the Association employed a training organiser to cope with the increased training needs of its members. During the last decade the membership of HELOA has widened to include many members working in widening participation.

## Our Present

HELOA continues to grow and currently has around 800 members from 142 Institutions. The Executive Committee now has three Vice Chairs, each with a specific remit encompassing: Communications & Partnerships, Training & Development and Group Activities. The Treasurer and the Secretary work closely with the Office to ensure the smooth running of the Association and the overall administration of HELOA's work.

After a period of unprecedented growth in the HE sector over the last decade, our membership is strong and varied. We are at a stage in our development where we need to review our progress so far, and set clear milestones for the future.

We need to ensure that we fully understand our members – who they are, the role they fulfill in their Institutions and how we, as an Association, can support them in their development. There is a project underway to address this. Alongside this project, the Executive Committee have also commissioned review groups to consider Partnerships, Training and our Constitution. These reviews will report back at the end of 2010 and will help the Committee establish a clear direction for the Association. All of this work is designed to help us develop VISION 2015. This is an umbrella term that relates to all of our strategic work which in turn determines our vision for the future of the Association.

## Our Future

The Association enters the next period of its history in a position of relative strength and buoyancy. Nevertheless, there are challenges ahead. The good work of the Association is not always well known and recognised in the sector, and often not even in our own Institutions. Rightly, the expectations placed on HELOA as it becomes a more widely recognised and respected Association are greater than on those Associations and Groups who are smaller and less well established.

The need for continued progress is exacerbated by a range of factors that will impact on the sector, and on the work of our members, over the next five years. The 18-21 age cohort will decline by 16% over the next decade making the market place more competitive. The Tuition Fee review is due to report in Autumn 2010 and a raising or lifting of the tuition fee cap is a possibility resulting in the increased 'marketisation' of the sector and a potential significant change to the market economy in which we operate.

In December 2009, the Higher Education Funding Council for England (HEFCE) funding letter to HE Institutions announced that £449m was being cut from the Higher Education budget – a ‘real term’ cut of around 7% for the 2010/11 academic year. In May 2010, the new UK Coalition Government announced a further £200m cut to the Higher Education budget – a total cut of £649m. An ‘emergency budget’ in June 2010 meant further scrutiny of Higher Education funding.

To halve the public deficit by 2016 the Government will have to cut £71b from spending. The Institute of Fiscal Studies say that this equates to a cut of a further 4.1% per annum for each of the next 4 years, rising to 6% for ‘non-protected departments’ over the time of the next Parliament. It will impact on the sector and it will impact on our members.

We need to use the opportunity we have to ensure that HELOA becomes a strong and resilient Association, that our members are well trained, highly developed and valued members of their Institutions and that the Association finds a voice for itself that is valued and respected and one that contributes pro-actively the future of Higher Education in the UK. The decisions that we make, the management and governance principals that we apply, and the direction that we set for the Association have to be the right decisions – and the UKC, the members you have elected to lead the Association, have to take those decisions quickly, decisively and sensibly.

We face these challenges from a position of relative strength, but we also recognise that the spread of our influence needs to be further extended and our purpose and meaning to our members needs to be better articulated.

The Association has grown, developed and changed over the last decade, and we believe that it can and will continue to do so. We believe the reason for this confidence is deeply embedded in the ‘can-do’ culture and ethos of an Association which values the contribution that all members make to its success. The challenges ahead also bring opportunities to an Association which has been successful in identifying and responding to such opportunities in the past.

# Section Six: Operational Details & Next Steps:

## Operationalising Our Strategies

The content and detail of this five year strategy will be agreed, after consultation with groups, by UK Committee in 2010. Following final agreement, the Strategic Plan 2010-2015 will be published and made available to all members via the website, with summary sent to all members by post.

The work of HELOA is divided into areas: Groups, Communications and Partnerships, Training & Development, Secretariat and Administration, and Finance. Objectives will be set for each of these areas by the Executive Committee and communicated to the membership through AGM each January.

Once these objectives have been agreed and set, Annual Operating Plans will be written and developed by each of the areas of the Association by the nominated Vice Chair or Secretary/Treasurer and shared with the team which they support. Where appropriate (for our employed staff), specific objectives will be written into Performance Reviews.

For each performance measure identified in this plan, annual SMART targets will be set in annual operating plans.

Operational plans will be reviewed regularly at Executive Committee and this area of our work will be given a space as a standing item on UK Committee Agendas for updates which can then be communicated back to members through group activities.

Annual reports will be developed at year end and progress against targets will be reported back to members at the following AGM.

We encourage your feedback on these plans. Please direct feedback via any member of the Executive of UK Committee, or via the HELOA office. (E-mail [heloa@essex.ac.uk](mailto:heloa@essex.ac.uk) or telephone 01206 873955).

Contact details for members of the UK Executive and Committee are available on the HELOA website at [www.heloa.ac.uk/contactdetails](http://www.heloa.ac.uk/contactdetails)