

HELOA Strategic Plan

January 2018 - December 2020

Mission

We are a professional Higher Education association, providing a public service by:

- Supporting our members to help students make informed decisions;
- Developing opportunities to enable our members to excel in their careers;
- Providing a forum for sector-relevant bodies and our members to interact;
- Representing the values of our members to a wider audience.

Vision

Our members are and will be professional, passionate and engaged advocates for higher education, helping potential students make an informed decision about their future in education by providing high-quality information, advice and/or guidance.

Values

- Every potential student has the right to make informed decisions about their future;
- Higher Education providers must support those students with the ability to participate to gain access to their courses;
- Our members are key stakeholders in informing potential students about their higher education options;
- We are a democratic, member-led association with a commitment to engaging and developing our membership through a network of national and regional Groups;
- The sharing and celebration of best practice for providing high-quality information, advice, and guidance is core to our success.
- Stakeholders, such as parents, teachers, and careers advisors, are better able to help potential students if they are themselves better informed about higher education options.

Strategic Priorities

Between now and 2020, we will:

1. Develop a solid and lasting foundation for the Association;
2. Provide sector-leading training and best-practice sharing opportunities for our members;
3. Work with third-party organisations to develop meaningful partnerships;
4. Engage with and learn from our members to improve our relevance and purpose;
5. Raise the profile of our members, our sector, and our Association.

Strategic Goals

We will ensure that:

1. Develop a solid and lasting foundation for the Association

- a. HELOA becomes a registered Charitable Association, as recommended and agreed by the membership;
Responsible: Vice-Chair (Governance and Policy)
- b. HELOA has a fully developed and articulated Constitution, Bye-Laws, and set of Financial Regulations, which are both fully compliant with our charitable status and meet the requirements of our auditor;
Responsible: Vice-Chairs (Finance) and (Governance and Policy)
- c. HELOA redevelops and regularly updates a Risk Register which is discussed as a Standing Item at UKC, enabling the Association to adapt proactively to change;
Responsible: Vice-Chair (Governance and Policy)
- d. The HELOA Office provides for the relevant needs of the membership. We will invest in its growth to enable our development as an Association and will undertake a 'systems' review to ensure our processes are fit for purpose;
Responsible: Vice-Chair (Administration and Membership)
- e. Active efforts will be made to engage individual members in national and Group decision and policy making, ensuring that there is ongoing interest from members in undertaking elected and appointed roles;
Responsible: Vice-Chairs (Governance and Policy), (Administration and Membership), and (Group Development)

2. Provide sector-leading training and best-practice sharing opportunities for our members

- a. Driven by a relevant and inspiring programme for networking and sharing best practice, the HELOA Annual Conference will grow year-on-year to appropriate levels as determined by the UKC on an annual basis;
Responsible: Vice-Chair (Training)
- b. Two conferences are held each year for new practitioners to the sector, with delegates drawn from a broad cross-section of our potential membership;
Responsible: Vice-Chair (Training)
- c. Additional training events are held each year at a national level, with multiple platforms of delivery, to engage at least 20% of our individual members;
Responsible: Vice-Chair (Training)
- d. Two new training sessions will be held each year in partnership with both the SLC and with UCAS, enabling our members to better understand and access our Partners, engaging at least 10% of our membership;
Responsible: Vice-Chairs (Training) and (Comms, External Relations and Partnerships)
- e. Each HELOA Group will provide regular training opportunities, including at Group meetings, to engage at least 20% of their individual members. Where appropriate, Group events will be open to the full membership;
Responsible: Vice-Chairs (Group Development) and (Training)
- f. We fully explore, examine and, if possible, introduce the opportunity to provide accredited training and/or formal CPD, with options presented to UKC for consideration;
Responsible: Vice-Chairs (Governance and Policy) and (Training)

3. Work with third-party organisations to develop meaningful partnerships

- a. A written working-level agreement is in place codifying our relationship with existing core non-commercial partners;
Responsible: Vice-Chair (Communications, External Relationships and Partnerships)
- b. Each of our commercial partnerships deliver either i) a consistent revenue stream for HELOA ii) a tangible membership benefit such as mutually-beneficial training sessions or membership discount or iii) both, with this benefit both defined and publicised;
Responsible: Vice-Chairs (Communications, External Relationships and Partnerships) and (Finance)
- c. An up-to-date framework outlining these relationships with external organisations, including our ongoing commitments to each other and a contact from that organisation, is publically available online and reviewed annually;
Responsible: Vice-Chair (Communications, External Relationships and Partnerships)
- d. An action plan will be drawn up annually, outlining which new partnerships which will be actively sought with relevant organisations, seeking to improve our sector reach and delivering additional benefits to members;
Responsible: Vice-Chair (Communications, External Relationships and Partnerships)

4. Engage with and learn from our members to improve our relevance and purpose

- a. An action plan will be drawn up on the basis of our member and potential member surveys with 'you said, we did' information provided for both, outlining the changes we made to encourage ongoing and/or new engagement;
Responsible: Vice-Chairs (Administration and Membership) and (Group Development)
- b. HELOA undertakes a one-off democratic review, at both National and Group level, to ensure that our elected and appointed roles are appropriate and relevant to enable delivery of this Strategy;
Responsible: Vice-Chairs (Governance and Policy), (Group Development), and (Administration and Membership)
- c. HELOA Groups, in collaboration with the National Office and supported by the relevant Vice-Chair, will work proactively and innovatively to encourage engagement from members, potential members and Primary Contacts;
Responsible: Vice-Chairs (Group Development) and (Administration and Membership)
- d. The scope and limit of HELOA's membership is firmly established, with active efforts made to diversify participation from different segments within that framework, including through monitoring participation trends in all aspects of HELOA activity;
Responsible: Vice-Chairs (Administration and Membership), (Group Development) and (Training);
- e. A toolkit, including Best Practice, is fully developed and actively updated, enabling our members to usefully share and learn from those areas of our work which are not deemed commercially sensitive;
Responsible: Vice-Chairs (Governance and Policy) and (Communications, External Relationships and Partnerships).
- f. The role and purpose of Primary Contacts is reviewed, ensuring that it meets the needs of both institutional administration and of ongoing representation, including at AGM;
Responsible: Vice-Chairs (Governance and Policy) and (Administration and Membership).

5. Raise the profile of our members, our sector, and our Association

- a. All current HELOA Policy is reviewed, refreshed and published on our website, with all policy subsequently subject to annual review;
Responsible: (Governance and Policy)
- b. Our membership benefits are fully articulated and widely circulated to deliver a growing membership, with additional membership benefits actively sought and communicated on an ongoing basis;
Responsible: Vice-Chairs (Administration and Membership), (Group Development) and (Communications, External Relationships and Partnerships)
- c. The importance of helping students make informed decisions is clearly articulated, with regular press releases both i) following relevant HE announcements and ii) celebrating the work of our members and the Association;
Responsible: Vice-Chair (Communications, External Relationships and Partnerships)
- d. At both National and Group level relevant news, information, and best practice is actively and regularly shared through Digests or other online media;
Responsible: Vice-Chairs (Communications, External Relationships and Partnerships) and (Group Development).