

## A BEGINNERS' GUIDE TO WRITING AN OUTREACH STRATEGY FOR OUTREACH

SUZANNA MARSH, UNIVERSITY OF OXFORD  
& PAUL WIGGINS, UNIVERSITY OF SUSSEX

*Private Baldrick:* I have a plan, sir.  
*Captain Blackadder:* Really, Baldrick? A cunning and subtle one?  
*Private Baldrick:* Yes, sir.  
*Captain Blackadder:* As cunning as a fox who's just been appointed Professor of Cunning at Oxford University?  
*Private Baldrick:* Yes, sir.  
*Captain Blackadder:* Well, I'm afraid it'll have to wait. Whatever it was, I'm sure it was better than my plan to get out of this by pretending to be mad. I mean, who would have noticed another madman round here?

Blackadder: Gae Fath Goidheire

## WHAT'S COMING UP

- What is a strategy and why do I need one?
- Where are we now and what's going on out there?
- LE PEST
- SWOT
- Defining and segmenting markets
- Market penetration
- The Strategy Pyramid
- Evaluation, KPIs and budgets
- Top tips and planning pitfalls

Interspersed with a Sussex University case study

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## WHAT IS A STRATEGY & WHY DO I NEED ONE?

- Handling well-meaning academics' 'brilliant' ideas
- Managing your workload: focus on the important stuff
- Planning for change
- Identify risks, work out how to deal with them
- Learn lessons for the future
- CV building

- A plan of action designed to achieve a goal or vision
- A detailed plan for achieving success in situations such as war, politics, business, industry or sport

- Can we be more focused?
- Can we be more effective?
- Can we be more efficient?
- Can we be more successful?

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## NO SUCH THING AS A PERFECT PLAN (BUT THAT'S NOT AN EXCUSE FOR NOT HAVING ONE)

- Plan needs to work for you
- You're going to need good data
- Plus the input of those around you

- Where are we now?
- Where are we going?
- How will we get there?

You are here

## POST-IT NOTE TIME!

"WHERE ARE WE NOW?"

YOU'VE GOT THREE MINUTES: JOT DOWN WHAT DATA/RESOURCES DO YOU NEED TO SEEK OUT TO ANSWER THIS QUESTION

An example to get you started: application and admissions figures

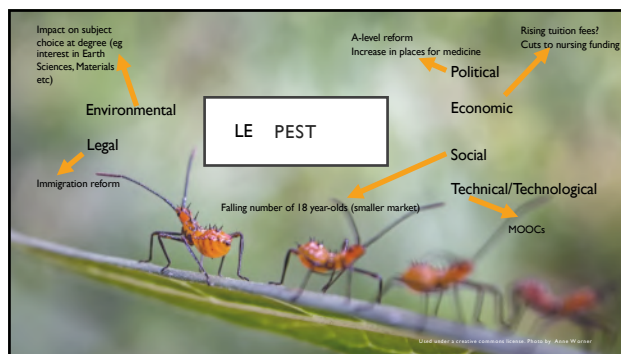
## SOME EXAMPLES OF USEFUL DATA/RESOURCES (THERE WILL BE MANY MORE/ALTERNATIVES)

- Your Access and Participation Plan. And historic performance against them.
- Any relevant existing plans/strategies: institution/college/department wide
- Metrics on your target schools:
  - Level of current engagement
  - POLAR data, ACORN data, TUNDRA (tracking underrepresentation by area)....
  - Where are you getting applications from? For what subjects? Are applications resulting in students on course?
- HESA data
- A Level subject-choice intelligence
- UCAS data on university subject choice trends
- Admissions and application metrics
- Which HEIs are our applicants also applying to?
- Are your competitors doing anything new, that might impact you? Eg launching a new course, changing their SCO?
- Profile of your current successful/WP applicants: where do they come from?

## WHERE ARE WE NOW? WHAT'S GOING OUT THERE?



- Competitive advantage – why are we better than the rest?
- What is our unique selling point? (USP)
- What do we need to worry about?



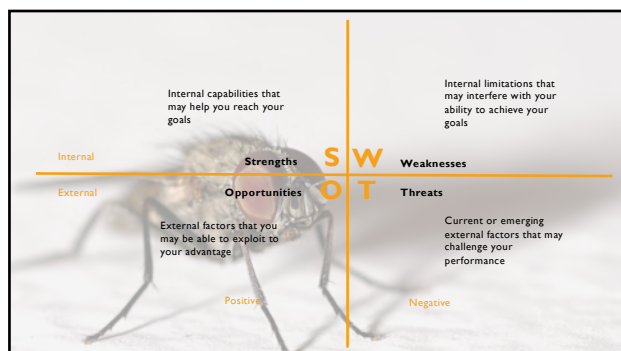
## POST-IT NOTE TIME!

YOU'VE GOT THREE MINUTES:

USING THE "LE PEST" FRAMEWORK, JOT DOWN SOME MACRO-ENVIRONMENTAL FACTORS THAT INFLUENCE YOUR OUTREACH WORK IN THE COMING THREE YEARS

GO!

Reminder: Legal, Environmental+ Political, Economic, Social, Technological.



## POST-IT NOTE TIME!

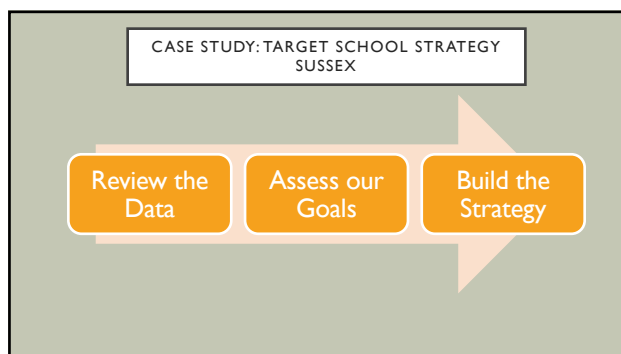
YOU'VE GOT TWO MINUTES:

START YOUR OWN SWOT ANALYSIS.

WHAT ARE THE **STRENGTHS** AND **WEAKNESSES** OF YOUR ORGANISATION THAT ARE LIKELY TO AFFECT YOUR OUTREACH WORK?


WHAT EXTERNAL **OPPORTUNITIES** AND **THREATS** ARE THERE?

GO!



### HOW WE USED THE DATA AT SUSSEX

<p><b>1</b></p> <p><b>Market Share Analysis</b> UK Regions South East Regions Gaps Changes Where else do our potential applicants go?</p>	<p><b>2</b></p> <p><b>Feeder School Analysis</b> Patterns over the last 5 years Applications and Entrants WP Profile Recruitment radii mapping Comparisons with 'Partner Schools'</p>	<p><b>3</b></p> <p><b>WP Partner School Analysis</b> Progression to Sussex WP Profile Levels of Engagement</p>	<p><b>Broader Schools Analysis</b> Density of WP Students 'Hub Regions'</p>
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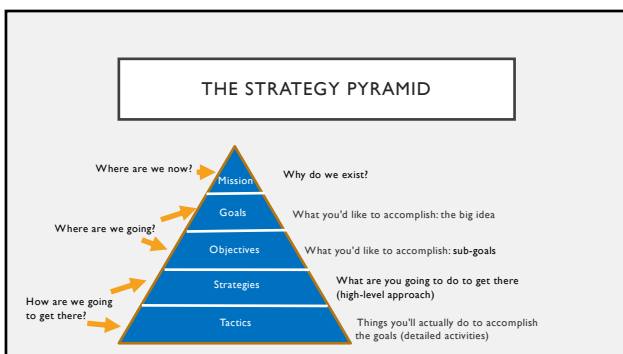


### SEGMENT & DEFINE YOUR TARGET MARKETS: POST-IT NOTE TIME!

YOU'VE GOT A COUPLE OF MINUTES TO DEFINE SOME OF YOUR TARGET MARKETS. HOW CAN YOU MEASURE YOUR MARKET PENETRATION?

GO!

Hint: think about product/service benefits sought, demographic variables, geographic variables, behavioral variables... Bonus points if you can figure out where you might find these groups of people.



### MISSION (PURPOSE) + VISION (AMBITION)

**Sainsbury's**  
To be the most trusted retailer where people love to work and shop.

**National Trust**  
To combat issues such as climate change and safeguard these special places for future generations.

THE MAIN AIM OF MANKIND SHOULD BE TO MAKE MAN KINDER

**Cancer Research UK**  
To accelerate progress and see three-quarters of people surviving the disease within the next 20 years.




### MISSION (PURPOSE) + VISION (AMBITION)

The University of Oxford aims to lead the world in research and education. We seek to do this in ways which benefit society on a national and a global scale. Over the period of this Plan we will build on the University's long traditions of independent scholarship and academic freedom while fostering a culture in which innovation plays an important role.... To fulfil the aims that no potential student should be deterred from applying to Oxford by financial or other barriers and that no student's success should be hampered by financial difficulties.

Oxford University

...to achieve the highest international standards in education and research, while continuing to serve its local communities through public engagement and the promotion of opportunity to individuals less favoured by financial or social background.


Queen Mary

A better university for a better world.... Designed to be different, the University of Sussex has a distinguished tradition of disruptive and experimental interventions.

University of Sussex

The mission of the University of Cambridge is to contribute to society through the pursuit of education, learning, and research at the highest international levels of excellence. The University's core values are as follows:  
 \*freedom of thought and expression  
 \*freedom from discrimination.

Cambridge University



### POST-IT NOTE TIME!


YOU HAVE ONE MINUTE:  
DOES YOUR COLLEGE OR DEPARTMENT HAVE ITS OWN MISSION STATEMENT? WOULD YOU LIKE IT TO? WRITE DOWN YOUR IDEAS HERE!

GO!

HINT: WHAT DO WE EXIST TO DO? WHY ARE WE HERE!

### GOALS

- A broad aim toward which your efforts are directed
- Expect to have several of them
- What (not how)



### GOALS: SIMILAR ACROSS INSTITUTIONS

- to encourage appropriately qualified young people from currently under-represented groups to enter higher education. University of Sheffield
- ... to solve real world problems, while providing transformational experiences for learners. University of Idaho
- Provision and promotion of programs and support which ameliorate the challenges faced by students in groups of disadvantage – transition, recession, progress and success programs, scholarships, financial aid, employment, housing. University of Melbourne
- Undertake sustainable growth in student numbers, with a greater proportion of students as defined by widening participation criteria engaged in undergraduate and postgraduate programmes. University of Kent
- ... lead in the design and delivery of innovative and accessible outreach activities. Bristol University
- To develop robust measures of success to help determine current and future priorities for widening participation and outreach. University of Surrey



### SUSSEX CASE STUDY: OUR GOALS

**University of Sussex**  
Access and Participation Plan

**Section one: content of our Access and Participation Plan**

1. This Access and Participation Plan is aligned to our Sussex 2020 Strategic Commitments... to better connectivity to a better world by 2020... the governing spirit of the original purpose of our University, built for new times and a new generation... to help more students achieve their dreams, through education, employment and progression, and those who cannot do so to be able to progress or engage with education and the wider world... to help them to progress to their next steps.

An excellent student, engage our students as co-creators in their learning experience... to create a supportive, inclusive environment, well-resourced and diverse... for all students... to ensure that all our students are supported and encouraged to achieve and progress in their learning experience and developing positive habits.

2. We have identified a number of key areas of focus... a number of which will help us deliver the overarching purpose of this Plan. The key actions for this area of work are:

- Create a student engagement, employability and enhancement programme;
- Increase a number of our engagement initiatives.

SUSSEX 2020 STRATEGIC FRAMEWORK

# A BETTER UNIVERSITY FOR A BETTER WORLD


### OBJECTIVES

- The areas in which your effort is directed to drive your mission and vision
- Mini goals – with detail.

**Not SMART:**  
"We want more state-school students on our courses."

**SMART:**  
"Make 65% of home student offers to those from state schools by 2021."


- Specific, significant, simple
- Measurable, manageable
- Achievable, agreed, assignable
- Relevant, resourced
- Time bound, trackable.



### OBJECTIVES: STUDY HIGHER EXAMPLE

Study Higher's...objectives as submitted to HEFCE in operating plan:


- increase in progression to HE in target wards by 3% between 2016-2020
- increase application to HE rates in target schools by 5% by 2020
- increase in BME participation in HE by 5% by 2020



### POST-IT NOTE TIME!

YOU'VE GOT FOUR MINUTES:  
START WRITING DOWN SOME GOALS AND OBJECTIVES.  
GO!

Hint: Goal: A broad aim toward which your efforts are directed. Objectives are more detailed, sub-goals.




### STRATEGIES & TACTICS

- Strategy is what Generals do; Tactics are what Captains and Lieutenants do.
- Tactics are fun and easy while Strategy is not fun and hard. (Apparently)
- Strategy is the "what" part of the equation and helps you answer the questions "What are we trying to accomplish?" & "What approach are we taking?" Happens over time. Broad.
- Tactics is the "how & who". Often a short, or one off item. Narrow, focused.


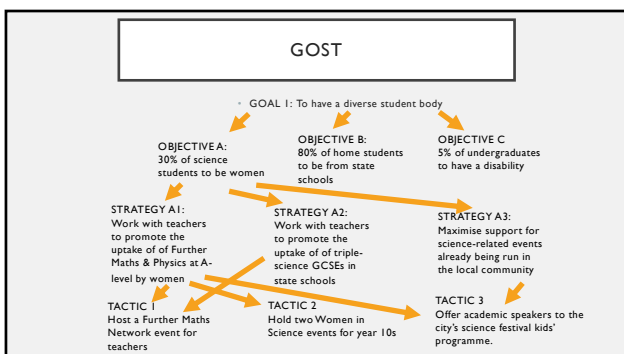
\*Strategy: Work with external organisations to reach hard-to contact prospective students from Polar quintiles 1&2.  
 \*Tactic: Host one Brilliant Club graduation day per year.

\*Strategy: Use non-traditional routes, including social media to engage with students.  
 Tactic: Create 10 short videos on access and outreach, featuring current students, for the website.



### SOME EXAMPLE STRATEGIES

- Grounding work in available research and data and growing the evidence base through better evaluation and monitoring of widening participation work throughout all areas of the student lifecycle
- Queen Mary
- The development and maintenance of successful partnerships with schools, FE colleges, voluntary sector and HEIs on an individual and collaborative basis.
- University of Kent
- Place careers development as a central theme in our outreach activities, equipping young people with the skills and knowledge needed to make well informed decisions about their futures
- City University
- ... enhancing our relationships with key influencers such as parents and teachers. It must also involve collaboration with our regional and national partners.
- Bristol University





### SUSSEX STRATEGY & TACTICS: SCHOOLS MATRIX

School	Number of HEI students	POLAR 0-1	HEI 0-1	BASED	HEI/HEI 0-1	Number of HEI students	% Working 9-9 GCSE's in Eng and Maths	Average A level point score	Proportion of GCSE entering HE	Score	HEI Score (rank)
86	10,000	12.0%	6.0%	6.7%	7	70%	21.32	27%	1.40	1	
100	7,000	2.0%	7.0%	2.0%	14	97%	27.74	50%	1.40	1	
205	1,000	11.0%	13.0%	8.9%	4	48%	20	32%	1.35	3	
302	21,000	4.0%	6.2%	9.2%	7	75%	14.22	48%	1.35	3	
228	6,700	0.0%	5.7%	16.0%	7	70%	12.34	49%	1.30	5	
0	10,000	20.0%	21.0%	4.0%	7	80%			1.30	5	
104	7,200	0.0%	10.0%	4.0%	11	60%	19.76	67%	1.30	5	
109	10,000	6.0%	9.7%	0.0%	13	70%	22.61	28%	1.25	8	
344	4.0%	1.4%	4.0%	21.7%	14	70%	14.35	43%	1.20	9	
224	11,000	0.0%	13.0%	16.2%	10	70%	20.61	38%	1.20	9	
116	7,000	4.0%	21.0%	1.7%	8	80%	24.82	31%	1.20	9	
162	10,000	0.0%	5.0%	13.0%	7	90%	19.24	30%	1.15	12	
176	2,000	23.0%	27.0%	26.7%	11	60%	23.9	40%	1.10	14	
0	10,000	10.0%	10.0%	11.0%	9	70%			1.10	14	
0	10,000	10.0%	10.0%	11.0%	9	70%			1.10	14	
160	6,000	0.0%	6.2%	10.0%	10	70%	16.07	43%	1.10	14	

### POST-IT NOTE TIME!

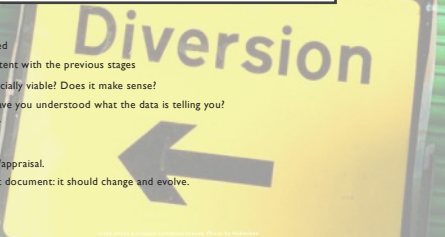
YOU'VE GOT ANOTHER FEW MINUTES:  
 START WRITING DOWN SOME STRATEGIES AND TACTICS TO ACHIEVE THEM  
 GO!



### EVALUATION/SCORECARDS/KPI/BUDGETS

- How will you measure progress? **KPI - Key Performance Indicators**
- Quantitative: Event attendance, website visitors, donations, column inches, downloads, views, application numbers, POLAR & ACORN data
- Qualitative: Feedback forms, focus groups, key messages in the media
- Budget.


### TOP TIPS & PLANNING PITFALLS



- Get the right people involved
- Each stage should be consistent with the previous stages
- Do a sanity check: is it financially viable? Does it make sense?
- Is it based on good data? Have you understood what the data is telling you?
- Include a timeline of activity
- It's not a door stop
- Feed into your PDR/review/appraisal.
- Remember it's not a perfect document: it should change and evolve.

### WHAT THE DATA CAN'T TELL US (AND WHY UNIVERSITIES NEED A PARTNERSHIP MANAGER)

- Recent changes – closed/new sixth forms, mergers
- Schools readiness/willingness to engage
- Broader Support Available to Schools – universities not on HEAT, charities, local authority
- Local infrastructure



## QUESTIONS?



### POST-IT NOTE TIME!

- YOU'VE GOT UNTIL THE END OF THE SESSION
- GO BACK THROUGH THE STRUCTURE WE'VE TALKED ABOUT, AND FLESH OUT SOME OF THE IDEAS
- GO!

