

HELOA

HELOA Strategic Plan
June 2021 - December 2023



Mission

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

- Supporting our members to help students make informed decisions;
- Finding opportunities to enable our members to develop in their careers;
- Provide meaningful partnerships between sector relevant bodies and our members;
- Representing the values of HELOA to a wider audience.

Vision

HELOA is a professional and engaged advocate for higher education. We enhance how higher education providers support potential students to make informed decisions about their futures. We support our members in providing access to high-quality information and advice services. HELOA works collaboratively to share best practice amongst members and provides opportunities to develop new skills.

Values

1. Every potential higher education student has the right to make informed decisions about their future.
2. Higher education providers must support students from all backgrounds to access the right education and career pathway for them.
3. Our members are key stakeholders in informing potential students and their supporters about higher education options.
4. We are a democratic member-led charity, with a commitment to engaging our membership through a network of UK wide events, communications, and geographical groups.
5. We collaborate to share best practice in student information and advice services.

Strategic Priorities

Between now and 2023 we will:

1. Strengthen the stability of HELOA to ensure the delivery of charitable objectives.
2. Maintain and grow meaningful partnerships with third-party organisations at national and group level.

3. Continue to provide sector-leading training, best-practice sharing and networking opportunities for our members.
4. Engage with and learn from our members to improve our relevance and purpose.
5. Raise the profile of HELOA's work and that of our members internally and externally.

Strategic Goals

1. Strengthen the stability of HELOA to ensure the delivery of charitable objectives	Owner	Supporters
A. Financial accounts are independently audited each year	UK Vice-Chair (Finance)	UK Chair
B. Risk register is annually reviewed and updated. UK Executive actively take steps to mitigate against risk.	UK Vice-Chair (Governance & Policy)	UK Executive
C. A professional development offering is put into place to encourage members to apply for elected and appointed roles.	UK Vice-Chair (Governance & Policy)	UK Executive
D. HELOA will undertake 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.	UK Vice-Chair (Governance & Policy)	UK Vice Chair (Group Development) and UK Vice Chair (Administration & Membership)
E. The HELOA Office will take a more active role in the development of processes regarding memberships.	HELOA Office	UK Chair and UK Vice-Chair (Administration & Membership)
F. The HELOA office will support the UK Vice-Chair (Governance & Policy) in auditing and reviewing standing orders and policies to ensure they are up-to-date and relevant.	HELOA Office	UK Vice-Chair (Governance & Policy)
G. Progress towards strategic goals will be monitored via an organisational development plan. This will be reviewed at UK Executive and UK Committee	UK Chair	UK Executive

meetings. Members will be updated on progress at HELOA's AGM.		
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2. Maintain and grow meaningful partnerships with third-party organisations at national and group level	Owner	Supporters
A. We will have a clear engagement plan in place with our core partners (e.g. UCAS, SLC & TSRG) to maintain, enhance and grow key collaborative working relationships.	UK Vice-Chair (Partnerships)	UK Chair
B. Our members will be at the heart of our work with partners and will: <ul style="list-style-type: none"> I. have both awareness and understanding of the types of partnerships HELOA has, the benefits they provide for all members and how they can feed into these partnerships; II. have the ability to communicate the work of our partnerships and specific partners within the membership and their internal and external stakeholders. III. have the opportunity to play a role in the development of partnerships at group and national level. 	UK Vice-Chair (Partnerships)	UK Vice-Chair (Group Development) and UK Vice-Chair (Communications)
C. Our work with partners will raise the profile of HELOA as an organisation externally and will create opportunities for networking, training and development for our members.	UK Vice-Chair (Partnerships)	UK Vice-Chair (Training)

3. Continue to provide sector-leading training, best-practice sharing and networking opportunities for our members	Owner	Supporters
A. Training events are held each year at a national level, with multiple platforms of delivery, to engage at least 40% of our individual members.	UK Vice-Chair (Training)	
B. Post-COVID-19 the balance between physical and virtual events and the introduction of virtual on-demand training content will be investigated.	UK Vice-Chair (Training)	
C. We will provide more targeted training events for specific levels or areas of the membership that engage 20% of our individual members.	UK Vice-Chair (Training)	UK Vice-Chair (Administration & Membership)
D. Training events will be held each year with HELOA affiliated partners, enabling our members to better understand and access our Partners. These will engage at least 20% of our membership.	UK Vice-Chair (Training)	UK Vice-Chair (Partnerships)
E. We will provide high-quality, and where appropriate, accredited training whilst continuing to evaluate our programmes via feedback from attendees.	UK Vice-Chair (Training)	

4. Engage with and learn from our members to improve our relevance and purpose	Owner	Supporters
A. An action plan will be drawn up based on our member and potential member surveys with 'you said, we did' information, outlining the changes we made to encourage ongoing and/or new engagement.	UK Vice-Chair (Administration & Membership)	UK Vice-Chair (Group Development)
B. HELOA Groups, in collaboration with the HELOA Office and supported by the relevant Vice-Chair, will work proactively and innovatively to encourage engagement from members, potential members and Primary Contacts.	UK Vice-Chair (Group Development)	UK Vice-Chair (Administration & Membership)

<p>C. 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.</p>	<p>UK Vice-Chair (Administration & Membership)</p>	<p>UK Vice-Chair (Group Development) and UK Vice-Chair (Training)</p>
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<p>5. Raise the profile of HELOA’s work and that of our members internally and externally</p>	<p>Owner</p>	<p>Supporters</p>
<p>A. Key HELOA communications will be shared through a variety of different channels, making use of an ongoing web presence to provide insight and best practice examples on demand to members and the wider public.</p>	<p>UK Vice-Chair (Communications)</p>	
<p>B. Best practice from within the membership will be championed through external and internal communication channels, demonstrating the key role that members have in supporting students to make informed decisions as well as ensuring the longevity of best practice from training events</p>	<p>UK Vice-Chair (Communications)</p>	<p>UK Vice-Chair (Administration & Membership)</p>
<p>C. Membership benefits will be actively shared with members, associate members and prospective members to ensure that all parties are aware of the range of benefits the charity offers and where to find more information.</p>	<p>UK Vice-Chair (Communications)</p>	<p>UK Vice-Chair (Administration & Membership)</p>
<p>D. The HELOA brand will be reflected in all external and internal communications to ensure that the charity is recognised and has a strong identity with external and internal audiences.</p>	<p>UK Vice-Chair (Communications)</p>	