

Registered charity number: 1182953 (England & Wales) and SC050285 (Scotland)

www.heloa.ac.uk



HELOA Strategic Plan February 2024 - December 2026



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 (actively) 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.
6. HELOA commits to being more sustainable in the various areas of our work and considers our impact as an association in the sector.
7. We are an inclusive charity, providing equal opportunities and embrace diversity in all aspects of our work.

Strategic Priorities

Between now and 2026 we will:

1. Understand the growth of HELOA and strengthen our stability to ensure the delivery of charitable objectives.
2. Maintain and grow meaningful partnerships with third-party organisations at national level and identify more group-level partnerships.
3. Continue to provide sector-leading training, best-practice sharing and networking opportunities for our members that are accessible and informative.
4. Engage with, understand, and learn from our members to improve our relevance and purpose.
5. Further raise the profile of HELOA's work and that of our members, internally and externally.



1. Understand the growth of HELOA and strengthen our stability to ensure the delivery of charitable objectives.	Owner	Supporters
A. Financial accounts are independently audited each year and budgets proposed and written with the sustainability of the association as a focus.	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 developed to encourage members to apply for elected and appointed roles, including training on equality, diversity, and inclusion (EDI) and the role of the trustee.	UK Vice-Chair (Governance & Policy)	UK Executive
D. HELOA will further explore the process of electing trustees and ensure the association structure supports members, strategic priorities, and goals.	UK Chair & UK Vice-Chair (Governance & Policy)	UK Executive
E. The HELOA Office workload will be reviewed each year to ensure the capacity and workload is consistent with HELOA's growth.	HELOA Office	UK Chair and UK Vice-Chair (Administration & Membership)
F. The HELOA Office will continue to support the UK Vice-Chair's across the association, with specific support on membership processing and finance invoicing and administration.	HELOA Office	UK Committee
G. Progress towards strategic goals will be monitored via an organisational development plan, reviewed at UK Committee meetings and members will be updated on progress at HELOA's Annual General Meeting (AGM).	UK Chair	UK Executive
H. Ensure that our equality, diversity, and inclusion (EDI) policies are regularly reviewed in line with changing policy and practice across the sector and measure implementation of action points.	UK Vice-Chair (Governance and Policy)	UK Committee



2. Maintain and grow meaningful partnerships with third-party organisations at a national level and identify more group-level partnerships.	Owner	Supporters
A. We will continue to develop and improve our engagement plan and framework for key partners and maintain, enhance, and grow key collaborative working relationships.	UK Vice-Chair (Partnerships)	UK Committee
<p>B. Our members will be at the heart of our work with partners and should:</p> <ol style="list-style-type: none"> 1. have an awareness and understanding of the types of partnerships HELOA has, the benefits of these and how they can feed into these partnerships; 2. be advocates for partnership work within the membership and with external stakeholders; 3. play a key role in the development of partnerships at group and national level. 	UK Vice-Chair (Partnerships)	UK Vice-Chair (Group Development) & UK Vice Chair (Communications)
C. Our work with a range of partners will continue to raise the profile of HELOA across the sector and will create opportunities for networking, training, and development of our members.	UK Vice-Chair (Partnerships)	UK Vice-Chair (Training)
D. As a national representative of HELOA, the Chair has regular engagements with key partners and affiliated organisations and feeds key updates back to the UK Committee.	UK Chair	UK Vice-Chair (Partnerships)
E. Seek collaborations with organisations whose values align with HELOA and support our aims to be more sustainable, inclusive, and diverse.	UK Vice-Chair (Partnerships)	UK Committee



3. Continue to provide sector-leading training, best-practice sharing and networking opportunities for our members that are accessible and informative	Owner	Supporters
A. Training events are held each year at national level, with multiple platforms of delivery, engaging at least 40% of our individual members.	UK Vice-Chair (Training)	
B. Provide targeted training events for specific levels or areas of the membership that engage 30% of our individual members.	UK Vice-Chair (Training)	UK Vice-Chair (Administration & Membership) and UK Vice-Chair (Group Development)
C. Deliver training events each year with input from HELOA partners, enabling our members to further access and better understand our partners. These will aim to engage 40% of our membership.	UK Vice-Chair (Training)	UK Vice-Chair (Partnerships)
D. Continue exploring the balance of physical and virtual events and review the sustainability of all events.	UK Vice-Chair (Training)	HELOA Office
E. Embed recommendations and action points from our equality, diversity, and inclusion (EDI) consultation across HELOA Training events.	UK Vice-Chair (Training)	HELOA UK Vice-Chair (Governance and Policy)
F. Consistently provide high-quality, and where appropriate accredited training, utilising member feedback and evaluation, that further develops the skills of HELOA members.	UK Vice-Chair (Training)	UK Committee



4. Engage with, understand, and learn from our members to improve our relevance and purpose.	Owner	Supporters
A. We will regularly monitor membership attendance at meetings and events, consider trends in participation, at a national and group level, and make efforts to design activities that support members' needs.	UK Vice-Chair (Administration & Membership)	UK Vice-Chair (Group Development)
B. HELOA Groups will work proactively and innovatively to encourage engagement from the wide range of HELOA members, their primary contacts, and new potential members.	UK Vice-Chair (Group Development)	UK Vice-Chair (Administration & Membership)
C. The scope of HELOA's membership is firmly established, with active efforts made to diversify participation and members will continue to be surveyed to understand how they feel HELOA contributes to their roles and the wider Higher Education sector.	UK Vice-Chair (Administration & Membership)	UK Committee
D. Reflect on and understand the growth of HELOA's membership over the past decade and take opportunities to evaluate HELOA's engagements ensuring they meet the wider membership needs.	UK Vice-Chair (Administration & Membership)	UK Committee



5. Further raise the profile of HELOA's work and that of our members internally and externally.	Owner	Supporters
A. HELOA communications will be shared through a variety of different channels, understanding which forms suit our members best and provide insight and best practice on demand via our website.	UK Vice-Chair (Communications)	
B. Membership opportunities and benefits will be actively shared with members, associate members and prospective members and audiences should be aware of HELOA's work and where to find more information.	UK Vice-Chair (Communications)	UK Vice-Chair (Administration & Membership)
C. Further explore how best practice from the membership can be championed via external and internal communication channels, demonstrating the key role members have in supporting students to make informed decisions as well as ensuring the sustainability of the association.	UK Vice-Chair (Communications)	UK Vice-Chair (Partnerships)
D. Utilise recommendations from the equality, diversity, and inclusion (EDI) consultation, undertake a website review and consider how HELOA communications are accessible to members and external audiences.	UK Vice-Chair (Communications)	UK Vice-Chair (Governance and Policy)
E. The HELOA brand will be consistently present and reflected across all external and internal communications, ensuring the charity is recognised and has a strong identity with internal and external audiences.	UK Vice-Chair (Communications)	UK Committee

