

ANNUAL REVIEW

2018

HESPA

HIGHER EDUCATION STRATEGIC PLANNERS ASSOCIATION



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CHAIR'S STATEMENT

The higher education sector has come through another challenging year, during which our members have been at the forefront of many of the major changes taking place. We've dealt with Office for Students (OfS) registration, ongoing HESA Data Futures work, changes to graduate outcomes, access and participation plans, Philip Augar's review of post-18 education and funding, Brexit planning and grade inflation (or changes to degree classifications), among many other things.

During such a transformative time, and with so many major data and regulatory changes taking place, planning and forecasting the future is increasingly difficult and our role to support members is ever-more pressured. Indeed, meeting the contrasting needs of our broad array of members is a major internal challenge for HESPA and we constantly seek feedback about what works, what doesn't and what else is needed by way of support. In order to help us know and understand our membership, we conduct a biennial survey to find out about member remits and responsibilities. This is hugely important to us, but also of great interest to our members, who may wish to look at different planning structures and conduct benchmarking exercises.

The survey results tell us much about the breadth of planning work which takes place. They also tell us that core to the role of a strategic planner is strategy development and implementation. This includes many more specific undertakings such as institutional monitoring and performance management, data production and analysis, the presentation of evidence to inform major plans and decisions. This list of tasks goes on and it is therefore essential for us to keep a close eye on where there is most need for support.

We want our members to engage more; with us and with each other. The role of the strategic planner in higher education is more prominent now than ever before and we are thrilled that the sense of community among members is growing all the time, but in order for us to fulfil our role in supporting planners, we'd like you to talk to us more, as well as each other. Don't be afraid to get in touch with any ideas, requests or constructive feedback.

Alison Jones
HESPA Executive Chair

KEY CHALLENGES AND THE ENVIRONMENT

Four members comment on the challenges of last year, many of which are still at large.

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Dan Kidd
Deputy Registrar
University of Wolverhampton

The continued challenge of managing data (and improving its quality) in an uncertain and fast-changing information landscape. The challenge, in particular, feels acute as we consider and balance the costs and benefits of different approaches. For example, whilst it was the intention for a data improvement project that delivers Data Futures, the delays and uncertainty around the programme necessitated a restriction of scope and a transformation into a more limited data returns project. This jettisoned the data governance piece into a separate strand which will present further challenges for the year ahead.

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Laura Knox
Director of Planning
University of St. Andrews

There has been a great challenge for planners in supporting their institutions in a sector-wide move towards evidence-led decision making and ensuring the sector values data as a tangible asset. The increase in demand from within institutions for robust, well-governed and integrated data for management information (MI), business intelligence (BI) and reporting brings with it a significant challenge for institutions to ensure their data infrastructure is mature enough to cope. Planners are often taking the lead on defining business requirements, and supporting colleagues in IT functions, to ensure the technical infrastructure is in place to govern data assets, in a cost-effective manner.

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Wesley Rennison
Director of Planning
University of Dundee

There have been changes in the sector in England which have ramifications for the devolved nations. Universities in the devolved nations find themselves being carried along on a tide of changes arising from the Higher Education and Research Act, with no real voice in the process. The levels of change and uncertainty means that we are not as focussed on issues within our national sector or in our institutions, which comes with a large opportunity cost.

Brexit has also been very challenging from an both an institutional point of view and a personal point of view (as an EU citizen living and working in the UK). The lack of clarity throughout the year has made planning difficult and the effort to prepare for a 'no deal' Brexit has required a large institutional effort that could have been diverted into more positive outcomes.

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Julie Leeming
Director of Planning
St. George's University
London

There have been a number of key challenges for planners over the last year. The Teaching Excellence Framework (TEF) has been one and, in particular, taking part in the pilot and ongoing annual assessment of the metrics and helping colleagues to understand the data. Involvement in ongoing Office for Students (OfS) registration and Access and Participation Plans has been another considerable challenge, along with keeping abreast of the many proposed changes in the sector and facilitating consultations.

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WHAT WE'VE ACHIEVED

Planning Remit Survey

'What do planners do?' is a question we're often asked by new members and non-planners. To help answer this, and to help prioritise and direct our support to members, we launched a Planning Remit Survey in 2016 to try and paint a picture of strategy and planning work in the higher education sector. The survey is biennial and we have now completed the second iteration. It aims to offer insight about the varying remits, responsibilities and structures of planning departments and teams, and identify interesting interfaces between various functions.

What the survey confirms is that no two planners are the same. It demonstrates clearly the breadth of work in which strategic planners in the UK are engaged and, in knowing this, we can hopefully work better to support them in many different and tailored ways.

Sector Representation

We continue to engage heavily in sector groups in order to represent the views of strategic planners in the sector. Many of our executive and wider members hold places on committees and working groups which are responsible for high level decision making. We actively encourage this to continue to ensure the voice of our members is heard and understood in sector wide discussion and debate.

Training

This year we have produced a new training strategy – HESPA Development - which aims to incorporate the varying needs of our members. We have researched widely and made considered decisions about pricing, audiences, regularity of events, coverage of topics, repeat events, proactive versus reactive activities, large and small-scale events and many other things. We are pleased to continually receive excellent feedback from our members about HESPA training and we hope to continue improving.

Collaboration

We have worked with a number of different representative bodies including our PHES family members; AUDE, BUFDG, HEPA and UHR, and others such as ARMA, AHUA, UUK, SROC, AGCAS. This work includes joint events, roundtable discussions, publications, lobbying activity and other advocacy work, and many other things. This willingness of partners or stakeholders to work together is very much a strength of the sector and we want to work harder to make it even more prevalent. We are a very open organisation and welcome any communication or approach from colleagues in the sector for discussion or joint work.

Interest Groups

We operate five interest groups: Policy, Risk, Student Number Planning, Strategy, Workload Management. Groups use dedicated discussion boards, workshops and meetings to engage members, share challenges and best practice. Next year we plan to further balance these communities of practice with our main training strategy to ensure that they complement our wider learning and development remit so that members get the most out of them.

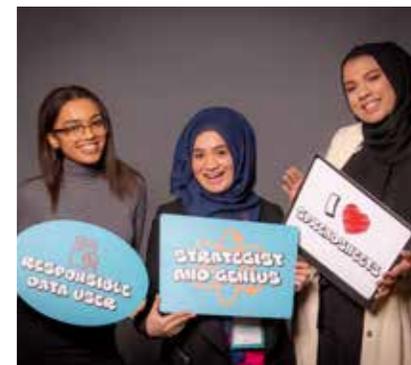
Annual Conference

In February 2019 we ran another successful conference for over 200 members at the University of Nottingham. The theme of the event was Value and the Greater Good and we were thrilled to welcome a host of exciting and interesting speakers such as Amatey Doku (NUS Vice President for Higher Education), Paul Greatrix (Registrar, University of Nottingham), Professor Shearer West

(Vice-Chancellor, University of Nottingham), Annette Vancil (Director of Technology Transformation, HESA), Dan Cook (Head of Policy and Development, HESA), Richard Smith (TEF Pilot Manager, Office for Students), Simon Perks (Sock Monkey Consulting), Dr Catriona Firth (Head of REF Policy, Research England), Ant Bagshaw (Director, Nous Group) and many more.

We were also very pleased this year to forge links with our counterparts in the United States and we welcomed Christine Keller (CEO) and Leah Ewing-Ross (Director of Research) of the Association of Institutional Researchers in the US to our executive meeting and annual conference for fascinating comparisons of our roles and sectors.

We have again received excellent feedback from delegates, some of whom were attending for the first time, presenting us with a new community to connect with and support for the good of the sector.



STRATEGY AND PRIORITIES

Our vision is that strategy and planning professionals are widely recognised and sought after as essential partners in securing the development, sustainability and international standing of UK higher education.

Our mission is to provide the UK strategic planning community with outstanding opportunities for professional development and to inform and strengthen evidence based higher education policy.

Our strategic objectives

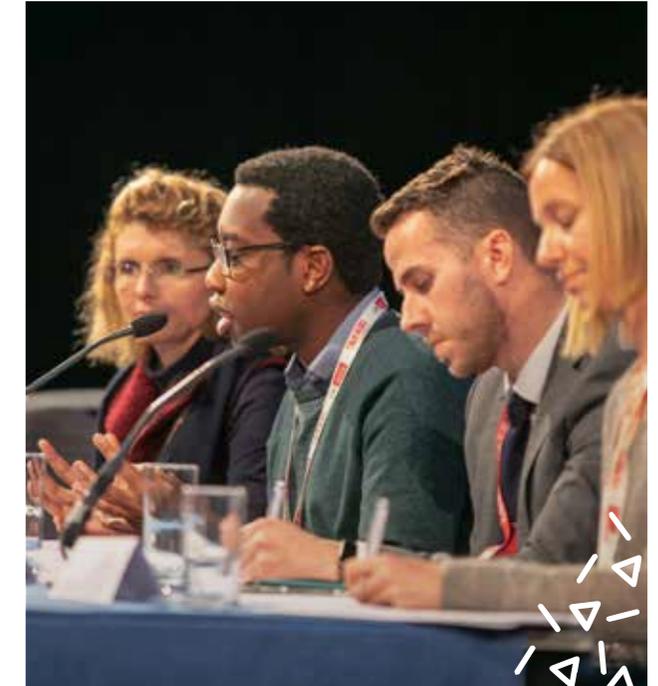
- To provide an active forum for strategic planners in higher education to network, discuss, improve and influence
- To be the primary organisation dedicated to supporting the professional development and career progression of those working in strategy and planning in UK higher education
- To represent a compelling and unified voice for members, while recognising their contrasting needs and ideas
- To influence and shape the future of higher education by challenging policy and promoting awareness and understanding of strategy and planning issues locally, nationally and internationally
- To establish new and improved ways of engaging stakeholders to benefit strategic planners, their wider connections and the sector overall
- To continually learn and seek out new knowledge and understanding, including that of operational best practice, to expand and improve that of our members

Our strategic priorities

- Enhance member services
- Strengthen sector wide engagement to influence and impact
- Secure organisational sustainability

What's next

- HESPA Development – full launch of new training strategy and increased provision to members
- More large-scale one-day events on topical themes
- Recruitment of a new post to support Jen, Jemma and Ruth
- Supplier user groups and roundtables
- Continued advocacy around policy and sector matters
- Another great annual conference
- Increased and improved resource and web content
- Strategic partnership working for the benefit of members



GOVERNANCE

HESPA is a special interest organisation (SIO) of the umbrella company Professional HE Services (PHES).

The other SIOs are AUDE, BUFDG, CHEIA, HEPA and UHR. HESPA is managed by its executive director, Jennifer Summerton, in association with a 16-strong active and engaged executive committee. Alison Jones is executive chair of the association.



Executive Committee

Alison Jones (*Oxford Brookes University*) Executive Chair

Jackie Njoroge (*University of Salford*) Treasurer and Deputy Chair

Shabana Akhtar (*University of London*)

Anita Jackson (*University of Kent*)

Simon Jennings (*Lancaster University*)

Nick Johnstone (*University of the Arts London*)

Daniel Kidd (*University of Wolverhampton*)

Olivia Kew-Fickus (*University of Birmingham*) Training Committee Chair

Aashish Khadia (*University of Bedfordshire*)

Laura Knox (*University of St Andrews*) 2018 Conference Chair

Caroline Low (*University of Lincoln*)

John Pritchard (*Durham University*)

Wesley Rennison (*University of Dundee*)

Rosa Scoble (*Brunel University London*)

Tony Strike (*University of Sheffield*)

Jennifer Summerton (*HESPA*)

Sally Turnbull (*University of Central Lancashire*)



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