



**HESPA**

HIGHER EDUCATION STRATEGIC PLANNERS ASSOCIATION

**ANNUAL REVIEW**  
**2017**

# CONTENTS

- 01 CHAIR'S STATEMENT
- 02 WHO WE'VE WORKED WITH
- 04 WHAT WE'VE ACHIEVED
- 06 BECAUSE PLANNERS LOVE DATA...
- 08 WHAT OUR MEMBERS SAY
- 09 OUR STRATEGY AND PRIORITIES
- 10 GOVERNANCE
- 12 WHAT'S NEXT



# CHAIR'S STATEMENT

In 2017 we have worked with key stakeholders, engaging in advocacy to help influence the shape of the sector. We have introduced a book about strategic planning in higher education, continued to represent the strategic planning voice on key working groups and programme boards, welcomed five new executive committee members and co-produced a report on league tables. We have delivered a diverse range of training events, interest group sessions and other resources, and kept members informed of sector developments while offering opportunities for their involvement in various HESPA projects.

The last year has been another one for significant change. Indeed, it seems that a dynamic political environment has become the norm for this sector and beyond. As the representative body for higher education strategic planners, who are responsible for forecasting and preparing for the future, this poses a serious challenge. Our work during the last 12 months has been varied and, as usual, we've tried to respond to ad hoc member requests as well as initiate our own projects and events to go some way to satisfying members' needs.

With such a varied membership, in terms of role, remit and institution, and with limited resource within the association, knowing what to prioritise can be a challenge. However, this is something we are acutely aware of and I believe that HESPA continues to develop and improve year on year in terms of the support it offers to members. Certainly, our outreach continues to grow and this enables groups to form and valuable networking to take place – something we are constantly told is more appreciated than anything else.

This year we welcomed a new interest group on Student Number Planning and within just a few days the number of participants exceeded 130. You can read more about that group on page 04, but it's a good example of the level of engagement we have achieved with members.

I hope you enjoy reading this review of our work and do look out for future opportunities and new events which are on the horizon.

All the best for 2018!

*Alison Jones*  
HESPA Executive Chair

## WHO WE'VE WORKED WITH

With a volatile external environment, collegiality within the sector is critical. We are stronger together. HESPA has taken an active role in ensuring that links between its members and others in the sector are maintained and strengthened.



Some examples of this include:

- **Higher Education Policy Institute (HEPI)** – we co-produced a report on league tables, written by Sally Turnbull.
- **Wonkhe** – as partners we engage on a number of activities, notably jointly hosting a conference on Developing University Strategies.
- **Parthenon EY** – as supporters of HESPA's conference and other work, Parthenon EY kindly hosted and supported the Developing University Strategies event with Wonkhe.
- **Guild HE** – we are delighted to have welcomed Gordon McKenzie to contribute to our policy interest group work.
- **Universities UK (UUK)** – we have worked with UUK to support their conference and a number of other projects. We were also very pleased to welcome Chris Hale to contribute to our policy interest group work.
- **Higher Education Statistics Agency (HESA)** – we continue to work with HESA on a range of projects and joint events, e.g. Data Futures (the Programme Board for which includes HESPA chair, Alison Jones) and Heidi Plus Analytics Labs work, among other things.
- **Association of University Directors of Estates (AUDE)** – not only do we share an office with AUDE, we jointly ran – for the second year running – a hugely successful conference on space planning. Look out for details about the next one this coming October.
- **British Universities Finance Directors Group (BUFDG)** – we also share an office with BUFDG and work with them on a number of joint communications and events.
- **Universities and Colleges Admissions Service (UCAS)** – our ongoing relationship with UCAS involves an annual UCAS Planners' Forum and representation on their data and qualifications groups.
- **Jisc** – in April we ran a fascinating workshop with Jisc on learning analytics and also collaborate with them for ongoing Analytics Labs, Community Dashboards and other BI work.
- **KPMG** – we ran, for the second year running, a TRAC for Planners event with KPMG and look forward to future work with them.
- **Department for Education (DfE)** – we are pleased to have government representation on our Higher Education Data Insight Group (HEDIG), which is chaired by Sally Turnbull.
- **Leadership Foundation for Higher Education (LHE)** – collaboration on various programmes and communications.
- **Knowledge Partnership** – we supported the Market Insight Conference for the second year running and actively encourage closer working relationships between strategic planners and market research colleagues.
- **SROC** – as co-supporters of one another's conferences, we enjoy working with SROC and its members across a range of common interests.
- **Funding councils** – we continue to strengthen our relationship with the funding councils and relish the opportunity to meet with various representatives at our quarterly executive meetings. We also have HESPA representation on a number of their boards and working groups.
- **National Union of Students (NUS)** – not wishing to forget why we are all here in the first place, we work hard to maintain student representation at a number of our events and aim to strengthen this link as we move into 2018.



## WHAT WE'VE ACHIEVED

### New executive members

This year we welcomed five new executive committee members: Shabana Akhtar (Oxford Brookes), Nick Johnstone (Ravensbourne), Caroline Low (Lincoln), John Pritchard (Durham) and Julia Roberts (Royal Holloway), all of whom were selected on the basis of a balance between their individual knowledge and experience and their intuition's type, location, mission and remit. We also say goodbye and thank you to three hugely active and longstanding members of the committee: Christine Couper, Craig Hutchinson-Howorth and Gary Sprules.

### Student Number Planning

This year we introduced a new interest group on student number planning, led by Miranda Routledge (Loughborough), Neil Davidson (Nottingham) and Anita Jackson (Kent). The launch of this group was met with huge enthusiasm, with membership exceeding 130 within just a few days. The group's first few months of existence have involved running a survey to establish the type of support members would like. We had a great response to the survey and have some useful feedback about how to target activity. The first substantive piece of work is a World Cafe style session at the 2018 annual conference and a similar session during the year for non-attending members.

### New training programme

We're pleased to have launched a new training programme for 2017/18 which began in September. It covers a range of activities including: Heidi Plus/ Analytics Labs work, policy roundtables, space planning, workload management, developing university strategies, risk management, facilitation skills, good practice forums, data management, UCAS planners' forums, the annual planning process (follow-up for class of 2017 and initial training for class of 2018), university finance for strategic planners, data analytics. We also take on new events on an ad hoc basis when the need arises. If you have any ideas or requests, please get in touch.

### Higher Education Strategy and Planning: a professional guide

With many thanks to the book's editor, Dr Tony Strike of our executive committee, for bringing it to fruition, we are delighted that Routledge has published this book, which was produced in association with HESPA. Huge thanks also go to all contributing authors, many of whom are active HESPA members. The book examines a range of subjects relating to the following five chapters and is recommended to all new and serving strategy and planning staff in the higher education sector.

- Context and positioning
- Integrated planning
- Centrality, co-ordination and connection
- Analytical capacity and capability
- Insight and information

### Sector liaison and relationship building

You can read more about our diverse work with stakeholders on pages 02 and 03, but we continue to prioritise this as one of our main objectives. Linking members to one another and to others in the sector is invaluable and will continue to be critical as we navigate the next few years. We've built some fantastic new relationships with partners and stakeholders this year and we'll continue to seek out new opportunities. We're a friendly bunch, so please don't hesitate to get in touch if you have any ideas or would just like an initial chat.

### HEDIG development

As chair of the Higher Education Data Insight Group (HEDIG), Sally Turnbull has continued to deliver useful discussions with key participants about the derivation and use of higher education data. With the Office for Students' new regulatory system, this is of increasing importance. Sally has also written a

report on league tables which was co-produced by HESPA and HEPI and which we were delighted to see published in January 2018.

### New website

Professional HE Services (PHES) colleagues have been working hard to upgrade our website and those of our PHES partners: AUDE, BUFDG, HEPA and UHR. Part of this upgrade includes increased functionality of the database which sits at the back end of the website and contains data about all of our members. This year we aim to capitalise on this more and use the data to profile members and help direct some of our work.

### Biggest annual conference

Last February we welcomed 286 delegates through the doors at the University of Strathclyde, making HSEPA17 our largest conference to date. The feedback obtained about the event was excellent and we hope to continue running a fantastic annual conference year on year. We hope you enjoy HESPA18 and please keep your eyes peeled for a 'save the date' message about HESPA19 – coming soon!

# BECAUSE PLANNERS LOVE DATA...

In **2017** we welcomed **282** new individual members that's a **39%** increase from 2016



We currently have **1001** individual members and **146** institutional members in total

In **2017** we welcomed **948** event attendees that's a **22%** increase

We have **1171** followers on Twitter a **66%** increase from last year.



Let's try and get to **2000** by next year

We have **357** special interest group members that's a **228%** increase from 2016!



We welcomed **286** conference attendees in 2017



We saw new **283** discussion posts in 2017 and there were **10,756** views on those posts

We've had **32,358** website views



We ran **15** events

## WHAT OUR MEMBERS SAY

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**Anna Barber**  
Head of Strategic Planning  
The Open University

HESPA continues to play a highly valuable role as the professional grouping for strategic planners in the HE sector. I have found both the formal events and the opportunities to build networks incredibly useful. It has helped me benchmark our approaches with other institutions, share best practice, discuss common issues and implement new approaches.

**Annis Mapleston**  
Head of Planning and Business Intelligence  
Birmingham City University

HESPA has been an invaluable source of advice and expertise, both in terms of my own professional development and in relation to the continued development of the activities of my department. Their workshops are particularly useful, especially with the focus on the practical application of theory to delegates' current issues and challenges.

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**Miranda Routledge**  
Director of Planning  
Loughborough University

Those in the Planning Office at Loughborough University are avid supporters of HESPA. We find the annual conference particularly helpful with its very relevant plenary and discussion groups and the valuable opportunities to network with other planners and compare best practice and challenges. The recent one-day conference on Developing University Strategies, which was hosted with Wonkhe, was also a fantastic event. The opportunity to hear real-life examples of how two Vice-Chancellors had approached their University strategy was a really interesting and valuable insight.

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**Matthew Shute**  
Head of Planning and Business  
Intelligence University of Bristol

HESPA is a great organisation which brings HE planners together to learn, communicate and to help each other. The HESPA conference is probably my only must-do annual external event. It's a great opportunity to hear some thought-provoking and sometimes challenging speakers, catch up with colleagues and attend best-practice presentations on tools and processes. It's always well-planned and well-organised. Recently HESPA has also increased its provision of training courses and interest groups and these are always popular among colleagues.

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**Scott Mulholland**  
PVC Corporate Development  
University of Central Lancashire

I wanted to acknowledge the quality of the conference at Strathclyde last year, which I felt demonstrated very clearly, the growing significance of the planning profession in HE and the effective role played by HESPA. I have also found the HESPA publications to be very helpful, in particular HE Strategy and Planning, edited by Tony Strike, which is a comprehensive, relevant and extremely useful book.

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# OUR 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 the higher education sector to network, discuss, improve and influence.
- To be the primary organisation for 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 shape the future of higher education by pushing boundaries and challenging external pressures, promoting awareness and understanding of strategy and planning issues and conducting advocacy work to influence policy makers.
- To establish new and improved ways of communicating and co-working with internal and external colleagues, 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.

## Priorities for 2017/18

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

# GOVERNANCE

HESPA is a special interest association (SIO) of the umbrella company Professional HE Services (PHES). The other SIOs are AUDE, BUFDG, 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 (University of Bradford)	Executive Chair
Jackie Njoroge (University of Salford)	Treasurer and Deputy Chair
Jennifer Summerton (HESPA)	HESPA Executive Director
Olivia Kew-Fickus (University of Birmingham)	Training Committee Chair
Sally Turnbull (University of Central Lancashire)	2017 Conference Chair
Shabana Akhtar (Oxford Brookes University)	
Helen Galbraith (Keele University)	
Anita Jackson (University of Kent)	
Simon Jennings (Lancaster University)	
Nick Johnstone (Ravensbourne)	
Aashish Khadia (University of Bedfordshire)	
Laura Knox (University of St Andrews)	
Caroline Low (University of Lincoln)	
John Pritchard (Durham University)	
Wesley Rennison (University of Dundee)	
Julia Roberts (Royal Holloway)	
Rosa Scoble (Brunel University London)	
Tony Strike (University of Sheffield)	

# WHAT'S NEXT



The challenges faced by the sector pose huge scope for us to develop and increase our support to members. The challenge for us is resource. Here are a few of the things we have prioritised for next year, along with all of the things we usually do.

### 1. Mentoring scheme

We're working towards a mentoring scheme which members can apply to be part of as mentors or mentees, or both – given that remits and roles vary so much and level of seniority doesn't always equal experience in some areas.

### 2. More training and events

We have a packed programme for the year ahead, see opposite page and look out for our 2018/19 schedule - coming soon.

### 3. Sponsorship opportunities for commercial partners

Keeping in mind our financial sustainability and potential to further develop the support we offer to members, we are offering a range of opportunities to commercial partners. We will provide more information about this soon, but do get in touch if you would like to discuss any options.

### 4. Space planning interest group

We are planning to launch our first cross-association interest group focusing on space planning. This is a collaborative effort between HESPA and AUDE and we hope it will help maximise potential in the sector by joining colleagues together to amplify brain power and reduce silos and duplication of work, leading to further sector efficiencies.

### 5. Midlands regional group

A number of planning sub-groups already exist and we haven't wished to disturb already good networking. However, some of our members from the Midlands region have commented that it would be useful to get together with local colleagues in an informal capacity to discuss various issues. Caroline Low (Lincoln and HESPA exec) and Miranda Routledge (Loughborough) are working with HESPA to launch a Midlands regional group in 2018. This will be treated as a pilot which, if successful, we may roll out more formally as the need arises. More information is to come, so watch this space.



### Forthcoming training events

<b>Good Practice Forum</b>	<b>23 March</b>
Data Management: from theory to practice	April
<b>UCAS Planners' Forum</b>	<b>May</b>
Annual Planning Process: class of 2017	May
<b>Annual Planning Process: class of 2018</b>	<b>May</b>
University finance for strategic planners	20 June
<b>Data Analytics: how to use data to communicate</b>	<b>July</b>

Our 2018/19 schedule, which begins in September, will be released by the end of February. Get in touch for more information.

### With sadness...

It is with a heavy heart that we remember Hayley Overton, a treasured colleague and friend, who sadly passed away unexpectedly in June. Many of you who attended last year's conference and other events will have met Hayley and been captured by her beautiful smile and friendly professionalism.

Hayley made a huge contribution to HESPA and she is missed in that regard, yet she is also greatly missed as a friend and lunchtime buddy with whom many a giggle was shared. Let's allow Hayley to teach us that nothing in life can be taken for granted. We should live each day to the fullest, as she always did.





HIGHER EDUCATION STRATEGIC PLANNERS ASSOCIATION

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