



ANNUAL REVIEW



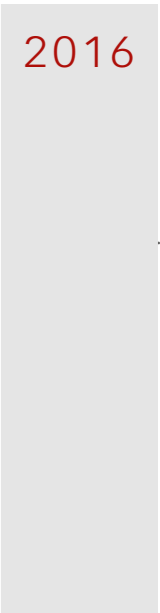
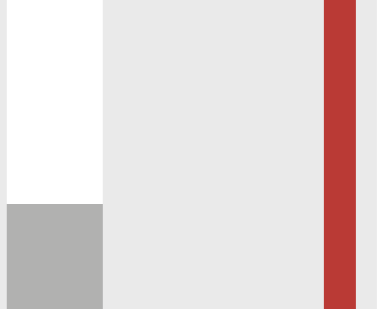
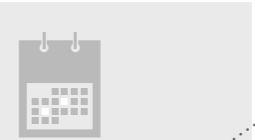
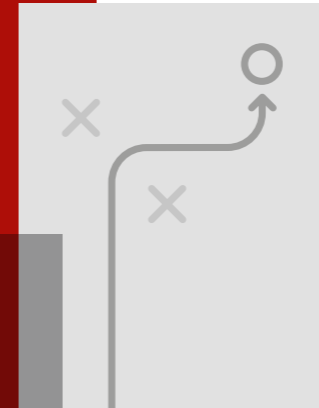
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2016



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CHAIR'S STATEMENT

In 2016 we have worked with members and stakeholders to pave a way forward for strategic planners in higher education amid unprecedented political upheaval. We have delivered projects, resources, training and events and continue to engage heavily in advocacy to influence future policy around higher education data and other new requirements.

This year we carried out a Planning Remit Survey to define the role of the strategic planner. Instead of finding a definition, we instead highlighted the huge diversification that the role entails. The colourful expansion of planning-related work provides with it a wealth of scope for HESPA and we are now able to exploit pockets of expertise and direct enquirers to the right people and institutions. We may also find, from exposed gaps, the need to upskill certain parts of the sector and this will be a key strand of our work next year as we launch our new training portfolio (see page 13).

With so much transition in the sector, our job to make planners' voices heard is increasingly vital and HESPA continues to seek representation on the working groups of stakeholder organisations such as UUK, HESA, Jisc, UCAS and the funding councils. We have seen a good number of new appointments on external working groups for HESPA in 2016 and we hope to see more next year as new groups increasingly

emerge to assist in managing the changes brought about by the general disruption in the sector. We also continue to nurture a close working relationship with media and think tank organisations as they become ever-more influential.

In 2016 we actively engaged in joint work with stakeholder organisations and we will continue to work in this way and build on the strength of these relationships as we move forward in 2017. Forming allies with other sector bodies to provide a strong and persuasive voice for higher education has never been more important.

I have immensely enjoyed my first year as HESPA executive chair and stand poised for 2017 and the challenges that await.

Alison Jones
HESPA Executive Chair



WHO WE'VE WORKED WITH

It is now more important than ever to be clued of sector wide developments and in close contact with stakeholders and policy makers. We have built strong links with a number of stakeholders and these relationships have flourished organically during HESPA's development. Yet during 2016 we have taken a more active and open approach to working, not only in communication with, but directly alongside some of these organisations.

Some examples of this type of co-working include:

HESPA-led HEDIIP project engagement and events.

Participation in HESA's DLHE Review

Launching the Higher Education Data Insight Group (HEDIG) (see page 4)

Supporting Universities UK with a range of workshops, events and project work

Participation in the HESA-Jisc BI project, via exec members Giles Carden and Jackie Njoroge's position as co-designers on the project



A list of stakeholders is below and we will continue to work with these important organisations, as well as build links with new ones in 2017. If you would like more information about how we work with some of these organisations, please get in touch.

Association of Research Managers and Administrators (ARMA)

British Universities Finance Directors Group (BUFDG)

Complete University Guide

Guardian Good University Guide

GuildHE

Higher Education Funding Council for England (HEFCE)

Higher Education Funding Council for Wales (HEFCW)

Higher Education Policy Institute (HEPI)

Higher Education Statistics Agency (HESA)

Jisc

KPMG

National Union of Students (NUS)

Scottish Funding Council (SFC)

Student Records Officers conference (SROC)

Southern Universities Management Services (SUMS Consulting)

The Association of Directors of Estates (AUDE)

The Association of Heads of University Administration (AHUA)

The Department for Education in Northern Ireland (DENI)

The Knowledge Partnership

The Leadership Foundation

Times Higher Education (THE)

University Alliance

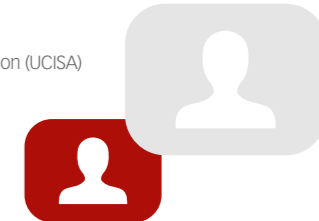
Universities and Colleges Admissions Service (UCAS)

Universities and Colleges Information Systems Association (UCISA)

Universities Human Resources (UHR)

Universities UK (UUK)

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WHAT WE'VE ACHIEVED



HEDIG Launch

This year we launched the Higher Education and Data Insight Group (HEDIG) to replace and extend the work of the previously jointly led (with HESA) Third Party Working Group. Exec member Sally Turnbull (UCLan) chairs the group which currently has 16 members, including HESPA members and senior representatives from HESA and the UK funding councils. The purpose of the group is to enhance public understanding of data on Higher Education and promote better use of such data within the public domain broadly and, more specifically, within UK public policy. The group is set to meet for the first time in December, when it will set out its agenda for the short- medium-term.

Planning Remit Survey

One of the questions which often arises when thinking about how to best support members is: what do planners do? In light of this, and to help others understand more about planners, we have carried out a Planning Remit Survey. You may have seen the survey, or even completed it, but what the results tell us conclusively is that no two planning teams are the same. The information to come out of the survey is massively useful in helping us to identify pockets of expertise in specific areas of planning work and this will be useful to HESPA, its members and its stakeholders. What the results also highlight are gaps in knowledge or training and we hope to fill some of these by providing better support to members. We are still in the process of analysing results from the survey, but plan to share the data soon, so watch this space.

SUMS

Along with our own planning remit survey, we have worked with SUMS; an organisation which has also carried out a related piece of research into planning teams. The two surveys convey different results and complement one another to give us an insight to the area of work in which we reside. The data will be invaluable to us as we continue working to support planners and to join up their various strands of work with other departments to deepen links and add value to the work itself.

Higher Education Strategy and Planning: a practical guide

HESPA is delighted to announce the forthcoming publication by Routledge on Strategy and Planning in higher education. This book will draw on and give voice to the well of talent and expertise within HESPA for the benefit of its members and a wider audience. Most of the chapter authors are HESPA members, each thought leaders in their field, and the editor, Dr Tony Strike, is a member of the HESPA Executive Committee.

HESPA Training 2016/17

We recently announced a brand new training portfolio comprising a number of workshops and seminars which reflect the needs of our members at a volatile and challenging time. Our provision of training stretches to cover the remits and specialisms of our diverse membership as we recognise that each planning and strategy worker is different to the next. These events are already underway, with some currently open for bookings. View the full programme on page 13.

Annual Conference

You may be reading this at the University of Strathclyde where we are holding our 2017 annual conference. The HESPA annual conference has always been a staple entry in planners' diaries and we hope to continue this tradition and to offer more to delegates as we constantly strive to develop and improve. The conference is an excellent opportunity to connect with likeminded colleagues to learn, share and debate specific areas of planning work and the state of the sector overall. It is also an opportunity to link up with key stakeholders for news and information and to nurture existing relationships, as well as building new ones.



HESA Jisc BI, HESPA co-designer role

The HESA Jisc BI project, which aimed to develop the best possible shared service for UK education, closed on 1 December 2016. HESPA executive committee members, Dr Giles Carden and Jackie Njoroge, worked as co-designers on the project to ensure the needs of strategic planners were represented. HESPA will continue to update members about Heidi-Plus and Heidi-Lab work and to engage with project members to offer related events and training activity.

TEF Metrics – beta testing

HESPA has this year worked with HEFCE to support the organisation in launching its metrics for the Teaching Excellence Framework (TEF). Designated HESPA representatives have received first sight of some of the metrics to ensure its accuracy before wider publication.

BECAUSE PLANNERS LOVE DATA...

In **2016** we welcomed **169** new individual members that's a **31%** increase from 2015



We currently have **718** individual members and **139** institutional members in total

In **2016** we welcomed **777** event attendees

We have **704** Twitter followers (please follow if you don't already!)



We have **81** LinkedIn group members

We have **109** member network group members

We have **11** sector liaison groups



We welcomed **215** conference attendees in 2016



We saw new **220** discussion posts in 2016 and there were **10,202** views on those posts

We've had **39,301** website views



We ran **15** events

2016 saw a **176%** increase in discussion post views on the previous year

We obtained **213** survey responses

“ WHAT OUR MEMBERS SAY



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Dr Sophie Crouchman
Loughborough University

HESPA continues to provide a wealth of opportunities for the Planning Office at Loughborough to attend sector events, engage with topical issues and network with colleagues from across the sector. Particular highlights include HESPA events bringing together different sections of the HE community (e.g. Estates and Planning colleagues to discuss space management and capital projects); the excellent Annual HESPA conference; and resources available on the HESPA website, including the popular discussion board which provides an informal channel of communication for Planners.

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Shabana Akhtar
Oxford Brookes University

For strategic planners and business intelligence staff across the HE sector, HESPA provides invaluable opportunities to network, impart knowledge, ideas and good practice with like-minded professionals. No stone is left unturned when it comes to the variety of communication platforms used to support, inform and connect planners (events, training opportunities, online forums, committee involvement). The organisations strong linkages with influential external parties from government and beyond means the planning community is now much more informed, than even before, of sector developments, policy changes, current thinking and the impact of these on our roles. For me, HESPA is a gateway to the wider HE planning community; providing essential networking and training opportunities to ensure we, as planners, continue to play an influential and critical role in steering university strategic thinking and direction.

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Laura Knox
University of St Andrews

HESPA has been a hugely beneficial forum and resource for *the Planning function at the University of St Andrews. Via the bespoke training events, the welcoming-and-accessible member's networks and the Annual Conference, HESPA has supported the professional and personal development of all team members, with opportunities pitched at all levels - from planning newbies to senior team members. HESPA has also, rightly, established itself as the 'go to' network for advocacy to statutory bodies, other agencies and HE policy makers – providing clarity and a sense of perspective where it matters.

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John Baker
London South Bank University

HESPA provides an outstanding forum for planners from across the entire sector to intersect through strands of common interest, and to stay connected to the relevant agencies and initiatives, so as to really get inside the latest developments in the shifting sands of HE policy and practice. I always come away from events feeling enthused and informed, and it's great to be able to connect to, and feel a part of, such a fascinating and inspiring community of practitioners. I can't wait for the forthcoming book on Strategy and Planning in Higher Education to be published.

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Sara McDonnell
Royal Holloway University of London

Moving from a focused reporting and statutory returns position to a wider strategic planning role has been made much easier thanks to having a ready-made and welcoming network available. HESPA's September Social event was so inclusive that I instantly felt part of a sector-wide team of professionals. Reading and posting on the discussion boards has also been really interesting and helpful in making me feel part of that network, especially during such a busy and challenging year in the sector. HESPA is engaged with its members and not only welcomes suggestions, but listens to feedback about how to support them so that we can all be the best at what we do.

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OUR STRATEGY

It is now more important than ever to be clued of sector-wide developments and in close contact with stakeholders and policy makers. We have built strong links with a number of organisations and these relationships have flourished organically since HESPA's development, yet during 2016 we took a more active and open approach to working, not only in communication with, but directly alongside some of these organisations. Looking to the future we will continue to be open about our position on collaboration and identify further opportunities for co-working, where appropriate, in order to add value.

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.

HOW WE ARE GOVERNED

HESPA is a special interest association sitting within the umbrella company Professional HE Services (PHES), alongside the Association of University Directors of Estates (AUDE) and the British Universities Finance Directors Group (BUFDG). It has an active and engaged executive committee of 16 and one dedicated staff member, Jennifer Summerton, at 0.8 FTE. A shared PHES Membership Officer, Hayley Overton, dedicates 0.2 FTE to HESPA work and the association also draws on PHES shared resource for back office functions and web support.

Executive Committee

Alison Jones (University of Bradford)	Executive Chair
Jackie Njoroge (University of Salford)	Treasurer and Deputy Chair
Dr Christine Couper (University of Greenwich)	Training Committee Chair
Simon Jennings (Lancaster University)	Conference Chair (2017)
Em Bailey (Heriot Watt University)	
Dr Giles Carden (University of Warwick)	
Dr Helen Galbraith (Keele University)	
Dr Craig Hutchinson-Howorth (Edgehill University)	
Anita Jackson (University of Kent)	
Aashish Khadia (University of Bedfordshire)	
Dr Rosa Scoble (Brunel University London)	
Gary Sprules (University of the Arts London)	
Dr Tony Strike (University of Sheffield)	
Sally Turnbull (University of Central Lancashire)	
Helen Watson (University of Oxford)	
Jane Boggan (Cardiff University)	



LOOKING FORWARD

Teaching Excellence Framework (TEF)

The TEF will dominate much of the planning realm in 2017 as we see results of the first studies carried out at institutional level and move into subject-level testing. As work progresses HESPA has an important job to do in keeping members updated and represented at both high-level and more detailed discussions, including disseminating information which will help ensure the best possible results for their institutions.

Partnerships

The next year will be an active one for HESPA and its members. We have newly partnered with Workhe and plan to run at least one joint event with them next year. HESA is another key stakeholder and we will be partnering with them to host ad hoc events to update members on Heidi-Plus and Heidi-Lab, Data Futures and other related work.

Training

With so much change in the sector it is more important than ever for staff to have the skills they need to ensure their institutions' success. We have launched a jam packed training portfolio for 2017 to help our members to thrive in the new HE world.



Strategy masterclass

Heidi-Plus/Heidi-Lab workshop

Learning analytics with Jisc

Strategy development and strategic analysis

Planning process and planning rounds

International League Tables conference

TRAC for planners

Strategy masterclass

Surveys

Finance for planners

The Teaching Excellence Framework

Facilitation skills

Change Management

HESA Data Futures mini conference



January

March

April

March/April

April

May

May

May

June

June

June/July

July

July

TBC

Look out for all this and more as we continue to work in both proactive and reactive ways, depending on how best to support members in changing internal and external environments.

All the best for 2017!

