



Professional HE Services

A Year in PHES

2017/18

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What is PHES?

Professional HE Services Ltd (PHES) is a limited company owned by UK universities. It provides an operating framework for membership organisations that support the HE sector, known as Special Interest Organisations (SIOs). PHES enables SIOs to share staff and other resources, and to operate effectively and efficiently.

There are currently four SIOs under the PHES 'umbrella'; the Association of University Directors of Estates (AUDE), the British Universities Finance Directors Group (BUFDG), the Higher Education Strategic Planners Association (HESPA), and Universities Human Resources (UHR). Each has complete autonomy as to how it operates within the legal and financial rules set out in the PHES agreement. Each organisation has its own structure and terms of reference and is run wholly by its own executive.

How does it work?

There are many benefits for SIOs being part of PHES, which in turn benefit their members:

| | |
|------------------------------|--|
| Legal Framework | PHES provides a shared legal framework and terms of reference so that each member SIO does not have to go through the expensive and potentially risky process of establishing their own |
| Financial Framework | The shared accounting and governance services provided through the PHES structure and PHES board is a considerable efficiency saving over each organisation contracting separately with, or employing an accounting function |
| Staff Resource | The shared staff resources (the Operations Director, Events Manager, and Communications and Membership support staff) offer considerable savings to all organisations and to their university members |
| Digital Resource | The PHES database and Content Management System is the 'engine' that runs behind all the SIOs' websites and other engagement and communications tools. This provides savings as each organisation does not have to pay in full for its own website, and improvements to one can be shared across the others |
| Intellectual Resource | As members of PHES, the SIOs' staff share the same small building and, in some cases, the same room. The proximity of staff allows each of the organisations to learn and benefit from all the others, and to share ideas, projects, networks, and workloads. There are joint PHES team meetings three or four times a year that facilitate this |

What do the Special Interest Organisations (SIOs) do?

There are thousands of membership organisations across the UK alone. While each plays a unique role in meeting the needs of its members, many of the features of each organisation – regardless of which sector they operate in and who they support – will be the same. Each organisation has members, a need to engage and communicate with them, and services to provide to them in return for (usually) a fee.

While the HE sector has many unusual features, there is much that HE membership organisations can learn from, and share with, other SIOs in the sector, as well as those from other sectors. PHES provides, among other things, resources for its constituent SIOs to use to think strategically about, and develop, their membership services and communications.



Typically, membership organisations in the HE sector seek to accomplish certain objectives within three main areas of support. These can loosely be described as:

| Goal 1 | |
|---|--|
| To inform, advise and support | To be an important source of information, comment, and support within the SIO's area of remit (e.g., Estates, Finance, HR, Planning) To promote high standards and best practice in that area |
| Goal 2 | |
| To facilitate networking and development | To provide forums for networking, discussion, consultation and exchange To provide and signpost to appropriate opportunities for learning and development |
| Goal 3 | |
| To partner, coordinate and advocate | To work in partnership with related organisations, regionally and nationally, for the benefit of the SIO's members To advocate on behalf of its members to government, policy makers, and external stakeholders |

Each organisation may place different priorities on each of the six areas, or may not have the resource to cover all six effectively, but these six will likely encompass the majority of an SIO's activity. Where other activities are pursued, such as the pursuit of additional income, it will usually take place in order to support the above goals, rather than in isolation from them.

Each SIO within PHES considers the above goals, and the extent to which its priorities and available resources allow it to focus on them, which in turn determines the level of service that can be provided in each area.

PHES in 2017/18

This year PHES welcomed a new organization, Universities Human Resources (UHR). The PHES SIOs also set themselves the challenge of working more closely with each other under the PHES umbrella. While this is still a work in progress, the group has taken some good steps forward this year.

- PHES organisations have worked closely and shared resources on a number of public/external-facing issues, including the Grenfell disaster, the impact of the collapse of Carillion, USS sustainability, and building ratings revaluations
- PHES SIOs have jointly interviewed and appointed shared staff so that each organisation can benefit from the greater continuity and expertise in a larger workforce, despite being small organisations individually

- PHES has jointly planned website and database developments that satisfy the needs of each organisation, and shared ideas on how to get the most from the technology

- SIOs have worked together to promote joint events, or events that would be of interest to more than one organisation, including in financial literacy, planning, counter-fraud, payroll, and more

The year ahead is particularly exciting, with a number of key website developments coming online. These will give PHES SIOs the opportunity to collectively develop their external networks, manage coordinated campaigns, and work together to improve data, processes, resources, and how they engage with new members.





“ AUDE is a very collaborative environment. It’s refreshing and different to other sectors.



AUDE exists to help its members. Our number one objective will always be to act in ways that provide the right support at the right time – be it in terms of information, career development, or a voice in the sector. AUDE acts as a network, connecting teams and individuals with peers across the country and beyond, so they can share knowledge and learn from each other. This happens year-round via our regional groups, online discussion boards and those small-scale but meaningful connections that professional networks provide.

AUDE holds two main annual events; the Conference (usually held in April), and the Big Conversation (held since 2017 in January), which is fast becoming a key way

for us to engage with our members. Our purpose here might be termed “thought leadership” – helping our members steer through troubled waters with the help of thought-provoking content, inspiring speakers and chances to meet and discuss and plan with fellow senior estates professionals.

The Big Conversation 2018 celebrated AUDE’s 25th anniversary and used that timescale as an opportunity to reflect on change over that period, and to think about current and future challenges. The change continues, with the rapidly shifting expectations of the student and academic users of our buildings, and the changing requirement for student accommodation.

Key Stats

2016/17 – 454 members attend AUDE training

£49,760 worth of subsidised training courses

Nine regional groups

342 delegates at conference

25 years old in 2017

Courses on strategic thinking, negotiating, personal effectiveness, presentation and media skills are among the varied CPD offer now available, and the range of courses continues to grow.

Sustainability Leadership Scorecard

The Sustainability Leadership Scorecard, launched in Spring 2018, is a tool for AUDE member institutions to build a single, engaging indicator of sustainability performance - and gaps in performance - that is easy to understand and communicate. The work was undertaken in partnership with EAUC and Arup, and builds on the Green Scorecard launched in 2016.

Estates Management Report 2017

Our Estates Management Report gives estates directors and their teams the information they need to benchmark their work against comparable institutions, which in turn feeds directly into long-term strategic decision-making. It is a key part of our annual pattern of management tools and insight provided to members. This year’s report reflects a challenging climate – demographics that mean fewer UK students, Brexit, an ageing estate, the demands of a 24-hour digital teaching and research environment, and the need to keep costs down in a tough political climate.

Big Achievements

More CPD Opportunities

AUDE’s first Summer School – a three-day residential course – took place in June 2018 at the University of Nottingham. It is a great example of the organisation’s increased focus on continuing professional development (CPD). With sessions often led by existing estates directors, it aimed to help prepare deputies and heads of teams to take the step up to director level. With over a dozen main sessions, evening speakers, and group project work, the Summer School represented a significant investment in learning from both AUDE and our delegates.

AUDE will always remain the home for directors to consider estates issues and gain leadership support within a peer community. But with staff at every level of seniority welcome to benefit from their HEI’s AUDE membership it is vital that we think broadly about the skills they need and the training we can develop to support them on their individual career paths.



The British Universities Finance Directors Group (BUFDG), which includes the Higher Education Procurement Association (HEPA), is the representative body for Higher Education (HE) finance staff in the United Kingdom. Its members are the Directors of Finance and Chief Financial Officers of almost all UK higher education institutions (HEIs). Its work supports over 5,000 HE employees in over 170 universities.

This year saw the appointment of Caroline Jones to support the activity of the Payroll and Expenses groups. We have also juggled a few things around and created a clearer separation between BUFDG and the PHEs support roles. Dominic (Operations Director), Gill (Events Manager), and Karen (Financial Operations Manager) now have PHEs email addresses, with their time split more accurately between the various PHEs

organisations. Karen also spends some of her time with just a BUFDG hat on, in her role as coordinator for the Financial Reporting Group. In addition, PHEs has recruited two new Membership Officers, who both work on BUFDG activity as part of their roles.

We continue to make good progress on organisational goals around the use of data, working group support, and maximising the benefits of technology and more collaborative working. However, we are aware that there remains so much more that could be done to add real value for members in each of those areas. 2018 marks the end of our 15-18 strategic planning process, and we look forward to sitting down this year and putting in place a new set of organisational goals for 2018-21.



“ Many thanks for giving me access to your website and facilities, which I’ve found to be extremely useful over the years

Key Stats

- 1,159 document resources downloaded
- 37,193 times from the website
- 606,547 website page views
- 7 annual conferences, 58 professional network meetings, and 44 training events
- 2,845 discussion forum posts, viewed 139,742 times
- 528 news articles, and 60 periodic newsletters

Big Achievements

BUFDG performs much of its work via its professional working groups; the ‘engines’ of how BUFDG delivers value for members. The working groups cover tax, financial reporting, payroll and expenses, learning and development, and counter-fraud. Additionally, HEPA focuses on supporting Heads of Procurement and their teams, providing guidance and resources and specialist group meetings for relevant topics. Highlights of work undertaken in the last 12 months are:

- The creation of resources and an e-learning module for members on the Criminal Finances Act
- Responding to consultations for members on VAT fraud in the construction industry, business risk reviews by HMRC, Making Tax Digital and the Office of Tax Simplification’s review of the VAT system, among others
- The development of a new metric of the financial sustainability of universities,

now adopted by the university regulator, and accompanying support and self-help sessions

- Professional support and resources for members in preparing for the impact of the apprenticeship levy, national minimum wage regulations, and IR35 rules on employment status
- The provision of resources and guidance on GDPR, contract templates, responsible procurement including the Modern Slavery Act, efficiency reporting and a new Libraries discussion board.

In addition, BUFDG has continued to make progress on two multi-year projects – on encouraging the development of Integrated thinking and Reporting <IR> within the HE sector, and on the production of a new e-learning system for members, with the first ten modules launched in 2018. Work will continue on these, and on a project to improve how universities communicate their value, over the coming year.



“ 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.



HESPA provides an active forum for members to network, discuss, improve and influence. It acts as a compelling and unified voice for its members, while recognising their contrasting needs and ideas. HESPA is dedicated to shaping the future of HE by challenging the status quo and promoting awareness and understanding of strategy and planning issues, and conducting advocacy work to influence policy makers.

As the primary organisation for the professional development of those working in strategy and planning-related roles, HESPA works to bring not only its direct members together, but also colleagues from different departments, who might be members of other PHES associations. In recognising the vast benefits of collaborative working, it seeks to share best practice more widely to improve the sector overall.

Big Achievements

HESPA's work can be broadly split into three main strands, though there is inevitably crossover between the three in terms of projects and activities.

1. Networking and connecting

HESPA provides numerous platforms for members to communicate. This year HESPA has used online forums, topical conference calls, focused roundtable discussions, workshops, meetings, conferences and

other events, Twitter, LinkedIn and online blogs – which are new on the website for 2018. In 2018 HESPA has also operated five special interest groups: Strategy, Policy, Workload Management, Risk and Student Number Planning. It is also in the process of getting ready to launch a new Business Intelligence group.

In recognising the value of connecting members with external colleagues and sector bodies, it has involved key stakeholders in various activities this year, such as a policy roundtable with Guild HE and UUK, the annual webinar with UCAS, partnership events with Wonkhe, collaborative work with Jisc, KPMG and the Knowledge Partnership, training workshops with HESA, strategy work with Parthenon EY and collaborative programmes with the Leadership Foundation (now Advance HE). HESPA also runs the Higher Education Data Insight Group (HEDIG), which is made up of a number of relevant cross-sector colleagues from HESPA's institutional members, regulators and funders, DfE, HESA and UCAS. This group works to promote the responsible use of data in the sector and raise awareness and understanding of issues.

2. Education and improving

This year HESPA has run 12 training courses covering learning analytics, Heidi Plus & Analytics Labs, student number planning, risk management, strategy development and implementation, facilitation skills, the annual planning process, space planning, workload management, finance for planners, data governance and data management and influencing policy. The remits and responsibilities of HESPA members vary dramatically and so the association endeavours to cover a wide array of useful topics which are prioritised through member engagement and feedback.

Key Stats

- 10,756 views on discussion posts
- 357 interest group members
- 286 annual conference delegates
- 32,358 website views
- 1,579 Twitter followers

The website contains a number of useful resources for members in the form of toolkit type guidance, presentations from previous training events, news, information, discussions, blogs and redirects. HESPA has also just launched a mentoring scheme.

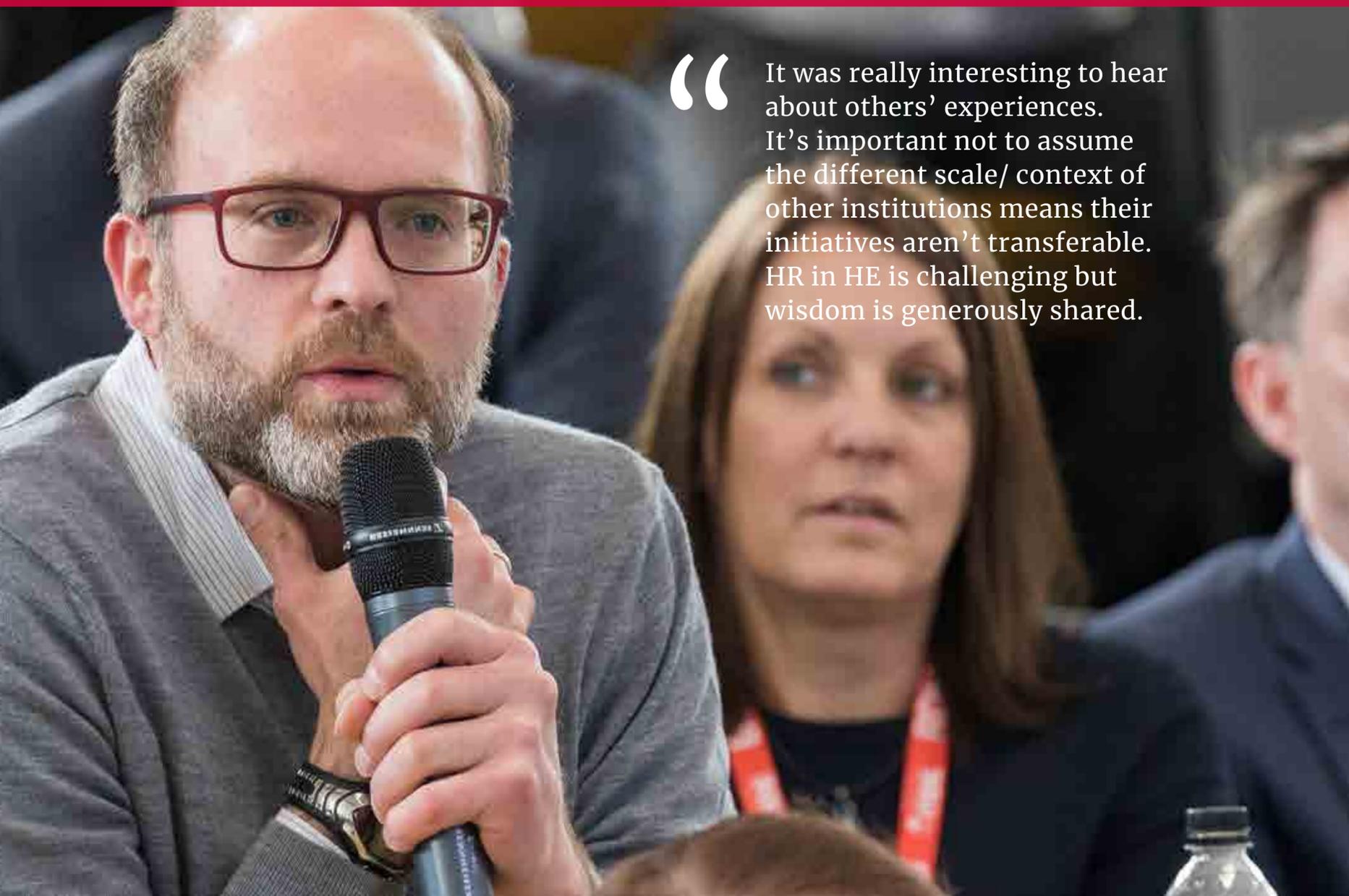
3. Influencing and advocating

This year HESPA has maintained key relationships and worked to develop new ones. It has published a book through Routledge entitled: Strategy and Planning: a professional guide. It has written a HEPI report on league tables. HESPA has also responded to consultation responses, and have met with senior officials and decision makers as well as being asked to represent strategy and planning professionals on panels and working groups, and to provide insight to projects and programmes. Examples this year include the TEF, Post-18 Funding Review, Data Futures, UCAS's Strategy, Jisc Analytics Labs, REF 2021 and others.



UHR exists to help its members think better, work smarter and to develop more impactful solutions to the complex people issues which face the higher education HR sector. Building on current priorities in 2018 UHR is focusing on expanding our CPD provision with both local and national events and programmes designed in response to demand and topical events. The big themes we face are writ large –

from pay and remuneration to pensions, performance enhancement in the light of TEF and REF to transformational change and Brexit. As a group of colleagues we share these issues and, whilst recognising the competitive nature of HE, can work together to solve the challenges which we face every day.



“ It was really interesting to hear about others’ experiences. It’s important not to assume the different scale/ context of other institutions means their initiatives aren’t transferable. HR in HE is challenging but wisdom is generously shared.

Key Stats

3,582 viewers of our online discussion threads

Over 900 subscribers to the weekly round-up

Over 1,000 delegates at training events

Big Achievements

Influencing across the sector

UHR responds to consultations and calls for evidence on behalf of our membership. This year those opportunities have included the CUC Code on senior pay and input to future pension discussions. UHR members act as board members, contributors and as liaison with a wide range of partner bodies and stakeholder institutions to maximise the voice of our members, and in 2018 these bodies include Advance HE, AHUA, QAA, UCEA and UCISA among many others.

As Sandra Heidinger, UHR Chair (2017-18) and Director of Human Resources at the University of Strathclyde says: “By its very nature, some of our work as HR Directors and HR team members is carried out behind the scenes. We influence, conciliate, negotiate and lead in ways that aren’t necessarily made public. Drawing on our shared experience, and with a solid body of best practice and robust legal and professional frameworks to guide us, we can benefit hugely from the significant support offered by our colleagues and co-members of UHR to guide us.”

Strengthening cross-sector links

In April 2018 UHR signed a joint memorandum of understanding with professional associations the Chartered Institute of Professional Development (CIPD), the Healthcare People Management Association (HPMA), and the Public Services People Managers Association (PPMA) which outlined how the four organisations intend to collaborate to promote the development of workforce strategies, policy, talent management programmes, research, thought leadership and other enabling solutions for the 21st Century workforce, delivering high quality services to all of our citizens. Jointly these organisations represent 6 million public sector workers.

Promoting best practice

UHR promotes best practice in the sector in numerous ways, from sharing ideas and tools via our membership network, to our Continuing Professional Development (CPD) offer, which is at the heart of our work. With members taking every role from administrator visa specialisms in recruitment, payroll and pensions, to deputy and director we aim to provide development opportunities that will help further our members’ career aspirations as well as provide the practical tools that will help today. We also run a mentoring scheme and hold a coaching register – all designed to further good practice within the sector.

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