FINAL REPORT

HEFCW
Stakeholder and Partner Consultation

May 2012
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1. Executive Summary

Background and Method

1.1 Following on from the 2007/8 Stakeholder survey, the Higher Education Funding Council for Wales (HEFCW) commissioned Strategic Marketing to carry out a second independent survey amongst its external stakeholders and partners about the services provided and relationships with those organisations.

1.2 Initially, an online survey was conducted during November/December 2011 to gather the broad views of individuals within education Institutions in Wales and Partners across the UK. The survey was predominantly quantitative in nature. In total there were 111 responses from institution contacts (62%) and 42 responses from partners (52%).

1.3 A second phase of work was undertaken in January/February 2012 to explore some of the key issues raised in the first phase in more detail. 50 in-depth telephone interviews were carried out – 35 with representatives from institutions in Wales and 15 with partners across the UK.

Feedback from Institutions

Awareness and Perceptions of HEFCW

1.4 Awareness of HEFCW is very strong. 87% either know a ‘fair amount’ or ‘very well’ about the work of HEFCW. This remains unchanged from the 2008 survey. Awareness of the work of other bodies is typically lower than for HEFCW, the highest of which were HESA (74%), QAA (73%), Universities UK (71%), UCAS (71%), Higher Education Wales (67%), and the Welsh Government’s Department for Education & Skills (63%).

1.5 74% have a favourable overall impression of HEFCW. There is no significant change since 2008. 6% have an unfavourable view of HEFCW. HEFCW is rated more favourably than other education bodies.

1.6 56% of respondents say that HEFCW is either ‘above average’ or ‘one of the best’ education bodies in terms of the service it provides to institutions. 32% consider it about average whilst 7% suggest it is below average or one of the worst organisations for service.

1.7 HEFCW is viewed very positively in terms of the attributes it exhibits particularly on approachability (88%), effectiveness (64%), respect (62%), how well it is in touch with the institutions it funds (62%) and responsiveness (60%). However, 68% find HEFCW bureaucratic and 33% comment on a lack of transparency.

Perceptions of HEFCW’s Role

1.8 Views are fairly consistent on HEFCW’s role amongst institutions but there are some areas where opinion is divided. 82% see HEFCW as an agent of the Welsh Government whilst 61% view it increasingly as a planning agency.
However, 47% see it as an advocate or spokesperson for the HE sector and 29% do not. This reflects confusions about HEFCW’s perceived role and what it will become in the future. Many acknowledge that the various Welsh Government policy measures on areas such as funding and reconfiguration and collaboration have changed HEFCW’s role but this has lead to uncertainty about HEFCW’s future remit.

1.9 63% agree that HEFCW works in partnership with the institutions it funds, actively promotes the fulfilment of equalities legislative requirements (60%), effectively responds to policy changes (60%), supports and encourages sustainable development (58%) and works in partnership with other higher education sector bodies (58%).

Levels of Engagement and Support from HEFCW

Overall engagement

1.10 63% agree that there are opportunities to give feedback to HEFCW on its work whilst 16% disagree. HEFCW is generally considered to be responsive to stakeholders as 66% believe that it acts or will take action on the feedback it receives. However, a significant minority of one in six (16%) disagree.

1.11 Overall engagement and support in most areas of HEFCW’s work is good with half or more giving a positive rating. The highest rated area is statistics and data collection where 70% gave a very good or fairly good response. For many of the lower rated areas, there are high proportions of ‘don’t know’ responses which may include respondents who have no involvement with that area.

Institutional Level Feedback

1.12 HEFCW is generally effective in most areas of its work with individual institutions and at least half say that it is fairly or very effective in all areas. 79% say that HEFCW is effective in ‘responding to requests and queries from institutions’ and 77% for data collection. The ‘not very/not at all effective’ ratings are in the minority but relate to engagement on institutional risk matters (11%), the annual funding allocation process (11%), responding to individual requests/problems and queries (10%) and financial monitoring (7%).

1.13 Feedback on improvements on various areas of interaction suggests that HEFCW has become more accessible to staff in institutions. The most positive changes are in electronic communications where 31% see improvement, ease of reaching staff (23%), face to face contact (20%) and dealing with enquiries and requests (19%). 15% see improvement in the quality of service and the involvement of institutions in policy development (11%) although 7% also see a deterioration on this last point.

1.14 Interactions which have deteriorated are typically in areas which reflect the ‘workload’ which institutions are required to undertake. 37% say that the administrative burden on institutions has worsened whilst 21% note deterioration in the timeliness of official requests.

1.15 Other areas which have deteriorated relate to HEFCW’s ability to understand the needs of and represent the sector. In both cases around six in ten see no
change, almost one in ten see an improvement (8-9%) but almost double say that there has been a decline (15-16%). Further analysis suggests these findings relate to the timing of official requests and the deadlines for response – particularly in Summer 2011, and the administration burden which is driven by the WG policy agenda. In both cases, these are heavily influenced by the pace of change in the sector. However, micro management and the level of monitoring are raised as ongoing issues.

1.16 43% see an improvement in the service provided to their institution, 12% a deterioration and 35% see no change. Improvements have been recognised in the level of service provided and the relationships with institutions. Many comment that whilst progress has been made, HEFCW should continue to work on the areas which have improved such as approachability, access to staff, effective electronic communications, face to face contact and dealing with enquiries and requests. Areas for further improvement include:

- More client focussed relationship and dialogue with institutions at senior level
- Continued face to face contact and consultation through regular focus groups and regional stakeholder events
- Dealing with enquiries and requests – some areas are considered slow e.g. new framework for capped numbers
- Communicate more about areas of HEFCW’s work other than funding

HE Sector Level Feedback

1.17 HEFCW is considered to be effective by at least two fifths of respondents in all aspects of its HE sector level activities particularly on policy development and consultation for which almost two thirds (63%) say HEFCW is very or fairly effective.

1.18 HEFCW is less effective on support relating to the regional dimension to planning and delivering higher education (37% not at all/not very effective), representing issues of concern to higher education to the Welsh Government (32%), support for reconfiguration and collaboration (30%), support for the new fees funding regime (25%). These issues reflect concerns about HEFCW’s ability to act as a strong intermediary between the HE sector and the WG.

1.19 HEFCW is considered to be highly effective at HE sector level in providing support for widening access (73%) and Welsh medium provision (71%). The least effective areas are support for developments in the skills and employability of students, links with businesses and the community, and enhancing research.

1.20 35% see improvement over the last two years in the service that HEFCW provides to the HE sector overall whilst a third see no change and 14% think it is slightly worse.

Contact and Dealings with HEFCW

1.21 Reflecting current areas of policy development, respondents would like more contact with staff involved in reconfiguration and collaboration (23%), student
matters (22%), funding (22%), strategic development (21%) and statistics and data collection (20%).

1.22 Satisfaction levels are relatively high with 66% of respondents saying that they are either very or fairly satisfied with the overall relationship between HEFCW and their institution. This has risen from 60% in the 2008 survey. 9%, however, are dissatisfied to some degree. This is slightly down from 12% in the previous survey.

1.23 37% say that HEFCW’s relationship with their institution has improved in the last two years; mostly it is ‘a little’ better. There is evidence of progress as this is up from 22% in the previous survey. However, a significant minority (13%) take the opposite view and believe that the relationship has worsened.

Communication and Engagement

1.24 The most commonly used communication channels are direct contact with HEFCW staff (83%), HEFCW circulars (82%) and the website (71%). The newsletter is used by 18% as a main channel. The preferred channels are also direct contact with staff and circulars followed by HEFCW conferences/seminars or meetings and the website. Direct contact is highly valued to enable understanding, gain clarification and assistance.

1.25 Feedback on the newsletter suggests that it may not always be received or recalled. It is generally perceived as a lengthy document containing limited ‘new’ information. A move towards an ‘e-zine’ format with links to relevant articles could make the newsletter more current and easier to scan for relevant news.

1.26 Circulalres are valued as a means of consultation but best combined with the opportunity for discussion and dialogue through seminars/workshops on key issues. This offers a useful opportunity for engagement with Institutions.

1.27 85% indicate that HEFCW communicates very well or fairly well with their institution. This compares with 75% in the 2008 survey. 7% of respondents say communication is fairly or very poor.

1.28 The most useful communications are circulars, the website and funding circulars all of which were considered useful by 80% or more respondents. The least useful channels are the annual report, press releases, the equality scheme, newsletter and the Welsh Language Scheme.

1.29 Again reflecting current HEFCW activities, respondents would like more information on funding higher education (60%), reconfiguration, collaboration and the structure of the sector (53%) and the fees regulatory role (38%).

1.30 In terms of policy areas, further information is sought on higher education in further education (45%). Other policy topics have a significant but lower level requirement for further information such as innovation and engagement (36%), skills and employability (36%), student engagement and representation (34%) and research (32%).

Areas for Improvement

1.31 The key areas for improvement in the next three years are:
Engagement and relationships with institutions – more partnership and consultation  
Stronger representation of the Welsh HE sector to Welsh Government  
Funding and fees – innovation, rationale, monitoring and advice  
Other areas including timing of circulars, deadlines, admin/bureaucracy, prioritisation of key policy areas, transparency and some efficiency improvements.

Feedback from Partners

**Awareness and Perceptions of HEFCW**

1.32 All partner respondents are familiar to some extent with the work of HEFCW. More than eight in ten (81%) say that they know very well or know a fair amount about the work of HEFCW. As with institutions, the partners are more familiar with the work of HEFCW than with other UK education sector bodies.

1.33 84% of respondents have a favourable overall impression of HEFCW, more so than for other organisations. The highest rated other organisation is the Leadership Foundation for Higher Education which is rated favourably by 72%.

1.34 85% consider HEFCW approachable and 83% say it is effective. Seven in ten agree it is responsive, in touch with the institutions it funds and respected. The most significant negative attributes or bureaucracy (43%), not transparent (18%), slow to change (18%) and out of touch with the institutions it funds (13%).

1.35 78% rate the quality of the body of staff positively. Many are unsure about the effectiveness of the Council and this is likely to reflect limited contact. HEFCW is fair and transparent when applying HE policy. There are mixed views on HEFCW’s perceived reputation amongst institutions; although most rate this positively (58%), a small minority disagree (8%).

**Perceptions of HEFCW’s Role**

1.36 Perceptions of HEFCW’s role are also mixed amongst partner respondents. Some areas are very clear, for example, the majority agree that HEFCW works in partnership with other HE sector bodies and with the institutions that it funds.

1.37 HEFCW’s remit is less clear and has evolved in recent years. 81% believe that HEFCW is an agent of the Welsh Government but almost two thirds (63%) say that it is an advocate or spokesperson for the HE sector whilst 23% disagree with this last point.

1.38 Two thirds (68%) agree that HEFCW is increasingly seen as a planning agency. This is up from around half in 2008. There are mixed views over whether this is a positive or negative development and most agree that this role has developed as a result of strategic planning changes on the WG policy agenda. Many believe that this role is likely to remain a key aspect of HEFCW’s role in the future.
1.39 Opinion is mixed on whether HEFCW is viewed primarily as a regulatory body with 30% agreeing that it is and 43% disagreeing.

**Contact and Dealings with HEFCW**

1.40 The majority of partners say that they are able to provide feedback to HEFCW on its work (83%). A small proportion disagree (5%). HEFCW is considered to be responsive to the feedback it receives (78%). Again, 5% disagree.

1.41 Satisfaction levels are high amongst partners and 83% are very or fairly satisfied with the relationship between their organisation and HEFCW. Most of the others are neutral or undecided.

1.42 57% see no change in their relationship with HEFCW in the last two years. A third say the relationship has improved. None of the respondents suggest that the relationship has worsened. Comments suggest that the main areas of change relate to improved accessibility and the ability to have open and honest dialogue between organisations particularly regarding HE sector policy issues. Maintaining relationships will be important in the future.

**Communication and Engagement**

1.43 Direct contact with HEFCW staff is the most popular communication channel with virtually all (95%) using this route to find out about HEFCW’s activities. Six in ten (60%) keep up to date with developments through the website which is up from 49% in 2008. Circulars are less commonly mentioned by partners compared to institutions but are still used by 43%. Just under a fifth (18%) currently use the HEFCW Newsletter as a main source of information.

1.44 Preferred routes for communication mostly echo those currently used with direct contact, the website, circulars and seminars/conferences being the most popular. However, almost a quarter would like to be kept informed through the HEFCW newsletter which is slightly higher than the 18% who currently use this route. There is some evidence from follow up activities that some respondents aren’t aware of receiving the newsletter.

1.45 80% say that HEFCW communicates well with their organisation. 5% indicated that it is carried out fairly poorly. The remainder were unsure.

1.46 Further information on HEFCW’s HE sector-facing activities is of interest on specific topic areas which reflect current changes and developments in the HE sector in Wales and the UK. The main priorities for further information are funding higher education and reconfiguration/collaboration/sector structure.

1.47 For HE policy activities, half would like further information on ‘innovation and engagement’ and ‘higher education in further education’. Other topics of interest include research and ‘skills & employability’.

**Areas for Improvement**

1.48 HEFCW’s key areas for improvement in the next three years should focus on:

- Communication – particularly on key policy issues, maintaining an open and transparent approach
- Future development of the HE Sector – strategic influence
2. Background & Objectives

2.1 Following on from the 2007/8 Stakeholder survey, the Higher Education Funding Council for Wales (HEFCW) commissioned Strategic Marketing to carry out a second independent survey of the views of its external stakeholders and partners about the services it provides and about its relationships with those organisations.

2.2 The specific objectives of this project were to obtain the views of HEFCW’s stakeholders and partners on the following range of issues:

- knowledge/awareness and views of HEFCW
- perceptions about HEFCW’s role
- perceptions about the quality of services and support provided by HEFCW
- contact and dealings with HEFCW staff and Council members
- the effectiveness of HEFCW’s methods of communication and interaction
- perceptions about the effectiveness of the relationships between HEFCW and our partners and key stakeholders
- priority areas for improvement
3. Methodology

3.1 Following on from the first Stakeholder and Partner Consultation which was carried out in 2008, a similar method was adopted for the 2012 consultation.

3.2 There was a two stage approach to the survey which began with an online survey of institutions and partners using two separate surveys. The second phase of work involved follow up depth interviews with respondents to delve more deeply to issues highlighted in the first phase of the research.

Phase 1 - Online Questionnaire

3.3 Two online questionnaires were set up for Institutions and Partners. This allowed for some variation in the wording of the questions between the two groups in addition to routing out questions which were not relevant to both. The questionnaire for Partners was shorter as these organisations typically have less day to day contact with HEFCW and not all topics were relevant.

3.4 The questionnaires were broadly based on the previous survey but changes were made to reflect developments in HEFCW's activities and its relationship with stakeholders, particularly institutions.

3.5 The online surveys and email invitations were bilingual to ensure that respondents were able to complete their responses in their preferred language.

3.6 Other formats were available for those who did not wish to complete the survey online. Copies of the questionnaires are included in the appendix.
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Stakeholder Database and Sample

3.7 The database of contacts to include in the consultation was provided by HEFCW. As some respondents had more than one role within the institutions, in some cases there were duplicate details which removed prior to launching the survey.

3.8 An initial ‘warm up’ email was sent by HEFCW to all respondents on the database to make them aware of the consultation and to ask for their cooperation and response.

3.9 Each of the contacts was sent a bilingual online survey invitation including a link to the survey questionnaire. Two reminder emails were sent out during the survey fieldwork period which ran from the end of November 2011 to 3rd January 2012. Telephone reminder calls were also made during 9th – 19th December.

3.10 Overall, 111 full and partially completed responses were obtained from Institutions contact resulting in a 62% responses rate. For partners, 42 responses were obtained resulting in a 52% response rate. Further details are provided in the following table:

<table>
<thead>
<tr>
<th>Database Details</th>
<th>Institutions</th>
<th>Partners</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original database provided</td>
<td>189 contacts</td>
<td>83 contacts</td>
</tr>
<tr>
<td>Excluded from base (e.g. duplicate contacts, no contact details, left university/college/retired)</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>Revised base</td>
<td>179</td>
<td>81</td>
</tr>
<tr>
<td>Full and partially completed responses</td>
<td>111</td>
<td>42</td>
</tr>
<tr>
<td>Response rate</td>
<td>62%</td>
<td>52%</td>
</tr>
</tbody>
</table>

Phase 2 - Follow up telephone interviews

3.11 Following the online survey of stakeholders a selection of the respondents were interviewed in greater depth to explore some of the issues identified in the first phase of the research.

3.12 As part of the online questionnaire, respondents were asked if they would be willing part in a follow up exercise in the language of their choice.

3.13 Respondents in Partner organisations were the most willing to take part in follow up discussions (62%) compared to just under half of the Institutions respondents (46%). 5% of institution respondents and 6% of partners requested the follow up discussion to be conducted in Welsh.

3.14 HEFCW wished to obtain a view from a broad base of respondents from different backgrounds and roles, particularly in the HE/FE institutions. To ensure that these were broadly representative of the roles covered in the general sample of institutions and partners, a small number of additional
respondents who had not engaged in the Phase 1 Survey were contacted for the Phase 2 stage.

3.15 The discussion guides used for the follow up phase were developed in consultation with HEFCW. The topics were based on key findings highlighted in the online survey and allowed for further exploration of issues identified.

3.16 In total, 50 follow up depth interviews were carried out. 35 of these were conducted with representatives from HE/FE institutions and 15 with Partner organisations in both Wales and across the UK.

3.17 Follow up interviews were conducted by appointment at the convenience of the respondent during January/February 2012.
4. Feedback from Institutions

4.1 This section of the report contains the details of the responses from the Higher and Further Education institutions that were consulted during the survey. Respondents were predominantly from the HE sector.

4.2 The findings cover the following topics:

- Awareness and views of HEFCW
- Awareness and views of other related organisations
- Levels of engagement with and support from HEFCW
- Contact and dealings with HEFCW
- Communication
- Respondent profile
Awareness and Views of HEFCW

4.3 Awareness of HEFCW is very strong amongst respondents. Almost nine in ten (87%) either know a ‘fair amount’ or ‘very well’ about the work of HEFCW. This remains unchanged when compared to the 2008 survey.

(Q2) “How well do you feel you know about the work of HEFCW?”

- Know very well: 30%
- Know a fair amount: 57%
- Know a little: 14%

Base: 111

4.4 Around three quarters of respondents (74%) have either a ‘very favourable’ or ‘mostly favourable’ overall impression of HEFCW. As with awareness, there have been no significant changes in general impressions. Around 6% have an ‘unfavourable’ view of HEFCW.

(Q3) “Which of the following best describes your overall opinion or impression of HEFCW?”

- Very favourable: 15%
- Mostly favourable: 59%
- Neither favourable nor unfavourable: 20%
- Mainly unfavourable: 5%
- Very unfavourable: 1%

Base: 111
4.5 By comparison, awareness of the work of other bodies is typically lower than it is for HEFCW, perhaps reflecting the job role profile of the respondent group and the dealings that they have with HEFCW compared with other organisations.

4.6 Awareness is best for HESA as three quarters (74%), ‘know very well’ or ‘know a fair amount’ about activities, QAA (73%) and Universities UK (71%) and UCAS (71%). Around two thirds have similar awareness levels of Higher Education Wales (67%) and the Welsh Government’s Department for Education & Skills (63%).
Impressions of HE-related organisations

(Q5) "For those organisations that you know at least a little about, please indicate how favourable your overall opinion or impression of each is:"

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Very favourable</th>
<th>Mostly favourable</th>
<th>Neither favourable nor unfavourable</th>
<th>Mainly unfavourable</th>
<th>Very unfavourable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher Education Statistics Agency (HESA)</td>
<td>9%</td>
<td>53%</td>
<td>38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality Assurance Agency for Higher Education (QAA)</td>
<td>10%</td>
<td>52%</td>
<td>34%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Universities UK (UUK)</td>
<td>8%</td>
<td>53%</td>
<td>41%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Higher Education Wales (HEW)</td>
<td>9%</td>
<td>49%</td>
<td>33%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UCAS</td>
<td>7%</td>
<td>51%</td>
<td>39%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership Foundation for Higher Education</td>
<td>18%</td>
<td>36%</td>
<td>43%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research Councils UK</td>
<td>10%</td>
<td>34%</td>
<td>54%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Higher Education Academy (HEA)</td>
<td>5%</td>
<td>37%</td>
<td>52%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept for Education &amp; Skills, Welsh Government (DFES)</td>
<td>7%</td>
<td>32%</td>
<td>49%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chairs of Higher Education Wales (CHEW)</td>
<td>1%</td>
<td>29%</td>
<td>65%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Committee of University Chairman (CUC)</td>
<td>8%</td>
<td>25%</td>
<td>67%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equality Challenge Unit (ECU)</td>
<td>7%</td>
<td>24%</td>
<td>60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept for Business, Enterprise, Technology &amp; Science, Welsh Government (BETS)</td>
<td>26%</td>
<td>67%</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Loans Company (SLC)</td>
<td>20%</td>
<td>65%</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept for Business Innovation &amp; Skills (BIS), UK Government</td>
<td>19%</td>
<td>73%</td>
<td>6%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base variable due to routing: 51–105 respondents

4.7 HESA, QAA, UUK, HEW and UCAS make a similar impression amongst respondents with around six in ten suggesting they have a ‘very favourable’ or ‘mostly favourable’ overall opinion. By comparison, three quarters feel the same way about HEFCW (Q3 – 74%).

4.8 For many organisations there are no particularly strong views. Four organisations receive an ‘unfavourable’ rating from around one in ten
respondents - DfES (12%), Student Loans Company (11%), Equality Challenge Unit (9%) and Higher Education Wales (8%).

Comparative Service Provided by HEFCW

(Q6) "How would you rate HEFCW in relation to the service it provides to your institution, compared to the other bodies you are familiar with?"

<table>
<thead>
<tr>
<th>Service Type</th>
<th>2012</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>One of the best</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Above average</td>
<td></td>
<td>38%</td>
</tr>
<tr>
<td>About average</td>
<td></td>
<td>32%</td>
</tr>
<tr>
<td>Below average</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>One of the worst</td>
<td>2%</td>
<td>5%</td>
</tr>
<tr>
<td>No opinion</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: 106

4.9 HEFCW fares well by comparison to other bodies and over half of institutions respondents (56%) say that it is either ‘above average’ or ‘one of the best’ in terms of the service it provides to institutions.

4.10 When comparing this overall view with the 2008 survey, there is a slight shift in opinions from those who have a negative view of service in 2008 (10%) compared to this time (7%). The proportion who believe that HEFCW is ‘about average’ remains almost static whilst those with a positive view has risen from 53% to 56%. Whilst these are only small changes, they are an indicator that there are signs of improvement which are reinforced by other feedback gained during the consultation.
Perceptions of HEFCW’s Role

(Q7) “Thinking about HEFCW’s current role, how strongly do you personally agree with each of the following statements?”

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Tend to agree</th>
<th>Neither agree nor disagree</th>
<th>Tend to disagree</th>
<th>Strongly disagree</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEFCW is an agent of the Welsh Government</td>
<td>40%</td>
<td>42%</td>
<td>12%</td>
<td>12%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>HEFCW works in partnership with the institutions it funds</td>
<td>18%</td>
<td>45%</td>
<td>17%</td>
<td>12%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>HEFCW is increasingly a planning agency</td>
<td>11%</td>
<td>50%</td>
<td>28%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW actively promotes the fulfilment of equalities legislative requirements</td>
<td>14%</td>
<td>46%</td>
<td>25%</td>
<td>11%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW effectively responds to policy changes</td>
<td>15%</td>
<td>44%</td>
<td>27%</td>
<td>8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW actively supports &amp; encourages institutions to improve &amp; progress sustainable development</td>
<td>13%</td>
<td>45%</td>
<td>26%</td>
<td>7%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>HEFCW works in partnership with other higher education sector bodies</td>
<td>13%</td>
<td>45%</td>
<td>25%</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW takes institutional diversity into consideration when allocating funding</td>
<td>11%</td>
<td>42%</td>
<td>23%</td>
<td>11%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>HEFCW is an advocate or spokesperson for the HE sector</td>
<td>10%</td>
<td>37%</td>
<td>22%</td>
<td>21%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>HEFCW takes account of the effects of its requirements on institutions’ resources</td>
<td>9%</td>
<td>36%</td>
<td>22%</td>
<td>18%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>HEFCW is primarily a regulatory body</td>
<td>9%</td>
<td>31%</td>
<td>27%</td>
<td>30%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: 106

4.11 Views are fairly consistent on HEFCW’s role amongst institutions although there are a few areas where opinion is divided on overall perceptions.

4.12 Eight in ten (82%) agree that HEFCW is an agent of the Welsh Government. Around six in ten agree that HEFCW works in partnership with the institutions it funds (63%), is increasingly a planning agency (61%), actively promotes the fulfilment of equalities legislative requirements (60%), effectively responds to policy changes (60%), supports and encourages sustainable development (58%) and works in partnership with other higher education sector bodies (58%).
4.13 Opinion is mixed on whether HEFCW is an advocate or spokesperson for the sector, takes into account the effects of requirements on institutional resources or is viewed primarily as a regulatory body.

**Feedback from follow up interviews**

4.14 Respondents interviewed in the second phase of the research were first asked about their perceptions of HEFCW’s role and in particular about:

- Role as a planning agency/agent of Welsh Government
- Interpretation of ‘regulatory body’
- Advocate/spokesperson for HE sector role

**HEFCW as a planning agency**

4.15 The increased perception of HEFCW performing a planning role is well understood and there are mixed views about how this is received.

4.16 Where this is received as a positive development it is due to the general climate of change in HE. For some, there is a perception that someone has to be able to take a strategic planning approach particularly in the light of the reconfiguration agenda and it is more beneficial if this is an organisation such as HEFCW which understands the institutions rather than Welsh Government or politicians.

4.17 The negative reaction to HEFCW as a planning agency relates to perceptions about how independent HEFCW can be and how much it can influence the Welsh Government on policy and strategy issues.

**Interpretation of HEFCW as a regulatory body**

4.18 Perceptions of HEFCW as a regulatory body are generally seen as part and parcel of being a funding body but there is recognition that this is a very narrow definition of HEFCW’s role which is considered to be more wide-ranging. Regulatory functions are in line with requirement for increasing accountability so there is a natural audit and compliance function. However, perceptions of the regulatory role will naturally change as the funding mechanism changes.

**Advocacy or spokesperson for the HE sector**

4.19 There is less clarity on the potential for HEFCW to perform an advocacy role. Partly this results from the confusion generated by the events of the last year. Some suggest that there is a lack of clarity on what role HEFCW should perform and there is a need for a clear mission statement. The uncertainty created by recent events leads some to question HEFCW’s future role.

4.20 The Welsh Government has strong views on the sector and HEFCW’s role. Institutions are generally understanding of the difficult position that HEFCW is in. HEFCW is seen as an advocate in that it ‘gets our ideas across to government’ whilst others see it as ‘delivering government’s policies’. Some comment that the ability to recognise HEFCW as an ‘advocate’ is influenced by the relationships that HEFCW has with individual institutions.
4.21 Respondents were asked to look at a series of two contrasting phrases or adjectives and indicate which most closely matched their opinion when thinking of HEFCW as a whole. They were also asked to indicate to what extent they felt HEFCW exhibits each attribute i.e. very or fairly. A neutral option was provided for those who had no strong views either way.

4.22 HEFCW is perceived very positively for most of these attributes, particularly on approachability (88%), effectiveness (64%), respect (62%), how well it is in touch with the institutions it funds (62%) and responsiveness (60%).
4.23 Areas which received negative feedback are bureaucracy and lack of transparency where 68% and 33% of respondents feel that this is the case.

4.24 Some of these issues were further investigated in the depth interviews:

Efficiency

4.25 HEFCW is generally considered to be efficient considering the environment it operates in and certainly very efficient in comparison with other public sector organisations. Inefficiencies are not considered to be widespread. Estates in particular are perceived to be very efficient.

4.26 Relatively few areas for improvements in efficiency were put forward. These include:

- reviewing the number of returns required from the sector
- reviewing what information is really required
- shorter papers/circulars
- response times in for policy issue clarifications/issues
- review deadlines for responses from HEIs. Sometimes these are quite tight but HEFCW is perceived to take quite a long time to provide feedback.

“Very efficient in producing circulars and advice. Slow in other areas e.g. problems with loss of credits”

“They are efficient for a public body. There are many areas of responsibility though within HEFCW and sometimes an overview of a process is missing - need to map out the different strands.”

“I’m told that some of the more junior staff sometimes take a while to respond to requests for information but this is not true of the senior people. It’s not something I’ve had reason to complain about and may be due to changes of staff or specific circumstances. Just noticed that a couple of times I’ve asked what’s happening about a specific situation and I’ve been told by my staff that ‘we’re still waiting for HEFCW’s response.”

“They ask for information in minute detail and probe for seemingly meaningless detail so if they stopped this they could be more efficient and focused on important things.”

Transparency

4.27 On transparency, HEFCW is generally considered to be transparent and approachable and this has improved over recent years. Many recognise that HEFCW is as transparent as it can be whilst understanding that some issues cannot be revealed early because they are still in
development. Some comment that meetings allow for more open discussions and understanding and that staff are generally very approachable.

“It’s to do with HEFCW’s ability to answer questions. They can do this with funding, but I’ve sat in meetings where people have asked questions to HEFCW and they, understandably, have to say they just can’t answer those questions. This gives people the impression that HEFCW are hiding something, but I think that if HEFCW can tell us something, they do tell us. It’s not their fault if the government stop them from giving certain things away.”

“With funding you get a breakdown - you see why you get it. Otherwise there’s a sense of hidden agendas. The re-allocation of student numbers is a prime recent example. There was no warning, no discussion, we were just told.”

“Core elements of funding is transparent but for many of the other project related funding it is not always clear.”

“On strategic matters there are often no minutes or minutes have sections blacked out which does not seem like transparency. However transparency is probably as good as it could be given the environment.”

“Minutes of key meetings tend to be slow in being published and there is a tendency to be secretive. Publishing minutes is not systematic.”

4.28 There is some scope for improvement in transparency in the following areas:
- more clarity on the contacts are for specific projects
- availability of minutes and timeliness of their availability
- more dialogue, particularly on policy development – consultation through seminars and workshops as well as through paper routes
- more information on the reasoning behind certain funding decisions
- communicate decision made by the council more quickly e.g. through brief summary of decisions taken or minutes published on the website

“Like the idea of the seminar as part of developing policy”

“Change the nature of consultations with institutions. Meetings with individual institutions. Any sessions with HEFCW are focussed on accountability rather than dialogue so it’s like going to the headmaster
asking to do something where as I’d prefer there to be full and frank discussion and a level playing field.”

“Publish all key documents and minutes on the web and do this promptly.”

Bureaucracy

4.29 Although HEFCW is generally considered to be a bureaucratic organisation, it is not necessarily considered to be a negative perception. Bureaucracy is part of the territory and necessary for a funding body to operate efficiently. The key areas which could be made less bureaucratic are the number of returns and the level of detailed information required e.g. particularly relating to plans required for small amounts of money.

4.30 Suggestions of ‘light touch bureaucracy’ are considered to be a good way forward. This would involve HEFCW reviewing what level of detail and information is needed to be accountable and fulfil requirements.

“Decision making is bureaucratic. But the organisation is not overly bureaucratic.”

“Yes it is bureaucratic but they deal with finances so it has to be like this.”

“The effort required to bid for small sums of money for strategic funds. A huge amount of information required by HEFCW.”
Other Perceptions of HEFCW

(Q9) “From your knowledge and experience of HEFCW, how would you rate each of the following?”

<table>
<thead>
<tr>
<th>Perception</th>
<th>Very good</th>
<th>Fairly good</th>
<th>Some good, some poor</th>
<th>Fairly poor</th>
<th>Very poor</th>
<th>Don't Know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality of the body of staff</td>
<td>34%</td>
<td>44%</td>
<td>17%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fairness and transparency in applying HE policy</td>
<td>11%</td>
<td>40%</td>
<td>21%</td>
<td>10%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>Reputation amongst institutions in the HE sector</td>
<td>8%</td>
<td>38%</td>
<td>25%</td>
<td>14%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Effectiveness of HEFCW Council</td>
<td>9%</td>
<td>27%</td>
<td>23%</td>
<td>9%</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Prominence of HEFCW’s media profile</td>
<td>27%</td>
<td>27%</td>
<td>23%</td>
<td>18%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: 105

HEFCW Staff & Council
4.31 HEFCW performs particularly well on the ‘quality of the body of staff’ where almost eight in ten (78%) of respondents give a ‘very good’ or ‘fairly good’ rating. Just 2% say that the quality of the body of staff is ‘poor’ or ‘very poor’.

4.32 A high proportion of respondents don’t have a view on the effectiveness of the HEFCW Council (30%). Nevertheless, more than a third (36%) rate it positively whilst one in ten (10%) say that it is ‘poor’ or ‘very poor’.

Transparency & Reputation
4.33 ‘Fairness and transparency when applying HE policy’ is also rated positively by half of all respondents (51%). However, 13% have the opposite view.

4.34 Opinions are mixed on HEFCW’s reputation amongst institutions in the HE sector in general with almost half (46%) rating it positively but a significant minority (16%) having a negative view.
Media Profile

4.35 There is a mixed view on the prominence of HEFCW’s media profile. Almost equal numbers of respondents consider it to be either ‘very good/fairly good’ (28%) and ‘very poor/poor’ (27%).

4.36 Views on the media profile were explored in more detail during the follow up interviews in order to understand this negative perception.

4.37 Most respondents consider HEFCW’s media presence to be relatively low profile. Many believe that there is a media role for HEFCW to promote the benefits and value of HE sector. This is particularly relevant in the light recent negative media coverage for the HE sector in Wales. However, not all believe that this role should be carried out by HEFCW. Some suggest that this is the role of HEW or Welsh Government. A number comment that HEFCW should remain fairly low key whilst using media coverage to remain transparent in its reporting of key decisions and policy issues.

“There is a role but need to be supporting the universities in this. More about promoting the benefits of HE to the wider community.”

“Has a role but not a primary role, it's secondary. Important to lobby to government and to be positive about what the sector has achieved. But it's organisations like HEW that should do more promotion”

“They should be more prominent because there's so much negative coverage of HE in Welsh press. It's hard for individual universities to defend themselves without it looking like spin, but HEFCW can be a neutral voice of reason representing the sector as a whole.”
Providing Feedback to HEFCW

(Q10) "Based on my experience, I have the opportunity to provide feedback to HEFCW on the work it does:"

<table>
<thead>
<tr>
<th>Feedback Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td>29%</td>
</tr>
<tr>
<td>Agree slightly</td>
<td>34%</td>
</tr>
<tr>
<td>Neither agree nor disagree</td>
<td>22%</td>
</tr>
<tr>
<td>Disagree slightly</td>
<td>10%</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: 105

4.38 Almost two thirds (63%) agree that there are opportunities to give feedback to HEFCW on its work whilst one in six (16%) disagree.

(Q11) "Based on my experience, I feel HEFCW acts (or will act) on the feedback it receives from its external stakeholders and partners:"

<table>
<thead>
<tr>
<th>Feedback Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td>23%</td>
</tr>
<tr>
<td>Agree slightly</td>
<td>43%</td>
</tr>
<tr>
<td>Neither agree nor disagree</td>
<td>18%</td>
</tr>
<tr>
<td>Disagree slightly</td>
<td>12%</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: 105

4.39 HEFCW is generally considered to be responsive to stakeholders as two thirds (66%) believe that HEFCW acts or will take action on feedback it receives. However, a significant minority of one in six (16%) disagree.
Levels of Engagement with and Support from HEFCW

(Q12) "How would you rate the current level of engagement and support you receive from HEFCW in each of the following areas?"

<table>
<thead>
<tr>
<th>Area</th>
<th>Very good</th>
<th>Fairly good</th>
<th>Some good, some poor</th>
<th>Fairly poor</th>
<th>Very poor</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statistics and data collection</td>
<td>17%</td>
<td>53%</td>
<td>15%</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Funding higher education</td>
<td>16%</td>
<td>46%</td>
<td>17%</td>
<td>4%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Policy and strategy development</td>
<td>16%</td>
<td>42%</td>
<td>22%</td>
<td>8%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Chief Executive and Directors</td>
<td>23%</td>
<td>34%</td>
<td>14%</td>
<td>6%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Institutional assurance</td>
<td>9%</td>
<td>44%</td>
<td>18%</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equality and diversity</td>
<td>9%</td>
<td>40%</td>
<td>16%</td>
<td>34%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Institutional financial matters</td>
<td>15%</td>
<td>34%</td>
<td>16%</td>
<td>5%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Institutional risk</td>
<td>9%</td>
<td>37%</td>
<td>16%</td>
<td>6%</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Corporate communications</td>
<td>12%</td>
<td>32%</td>
<td>30%</td>
<td>4%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Estates</td>
<td>16%</td>
<td>29%</td>
<td>14%</td>
<td>14%</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Chairman and Council</td>
<td>8%</td>
<td>26%</td>
<td>16%</td>
<td>5%</td>
<td>36%</td>
<td></td>
</tr>
</tbody>
</table>

Base variable due to exclusion of 'not applicable' responses: 69 to 94 respondents

4.40 We have excluded the ‘not applicable’ responses from this chart so that ratings apply to those who were able to give an opinion based on their experience of working with staff in each particular area. There are a high proportion of ‘don’t know’ responses for some areas which may indicate lack of contact.

4.41 Overall engagement and support from most areas is good with the majority receiving a combined very good/fairly good rating of around half or more. Where this is not the case, there are relatively high proportions of ‘don’t know’ responses which may include some respondents who have no dealings with that area.

4.42 The most highly rated in area is statistics and data collection where 70% gave a very good or fairly good response.
4.43 Negative ratings of very or fairly poor are very low in general and range from 1% to 13% although most are less than 8%. The highest negative ratings were received for engagement and support from the Chairman and Council (13%) and on policy and strategy development (12%).

Effectiveness of HEFCW’s activities at institution level

(Q13) "Thinking about your own institution, to what extent do you feel the following aspects of HEFCW’s activities are carried out effectively?"

<table>
<thead>
<tr>
<th>Activity</th>
<th>Very effectively</th>
<th>Fairly effectively</th>
<th>Not very effectively</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responding to individual requests/problems/queries raised by institutions</td>
<td>27%</td>
<td>52%</td>
<td>8%</td>
<td>10%</td>
</tr>
<tr>
<td>Data collection</td>
<td>21%</td>
<td>56%</td>
<td>4%</td>
<td>18%</td>
</tr>
<tr>
<td>Annual funding allocation process</td>
<td>16%</td>
<td>53%</td>
<td>9%</td>
<td>20%</td>
</tr>
<tr>
<td>Financial monitoring</td>
<td>22%</td>
<td>44%</td>
<td>7%</td>
<td>24%</td>
</tr>
<tr>
<td>Engagement on institutional risk matters</td>
<td>15%</td>
<td>46%</td>
<td>9%</td>
<td>28%</td>
</tr>
<tr>
<td>HEFCW assurance services</td>
<td>9%</td>
<td>41%</td>
<td>5%</td>
<td>42%</td>
</tr>
</tbody>
</table>

Base variable - excludes ‘not applicable’ responses: 85-96 respondents

4.44 The ‘not applicable’ responses have been excluded from this chart so that ratings apply to those who were able to give an opinion based on their experience of the various activities.

4.45 HEFCW is generally effective in most areas of its work and at least half of all respondents say that it is fairly or very effective in all areas. Almost eight in ten say that HEFCW is particularly effective in responding to requests and queries from institutions (79%) and data collection (77%).
4.46 Respondents who rated HEFCW as not very effective or not at all effective are in the minority but represent between 4% and 11% depending on activity concerned. The most significant of these relate to:

- Engagement on institutional risk matters (11%)
- Annual funding allocation process (11%)
- Responding to individual requests/problems and queries (10%)
- Financial monitoring (7%)
Change in interactions

4.47 This question was aimed at monitoring perceptions of any change in the interactions between HEFCW and the institutions. The two year timescale was intended to allow for changes which were implemented since the last stakeholder consultation to be taken into account.

4.48 The most positive changes are in the areas of electronic communications where almost a third see improvement (31%), ease of reaching staff (23%), face to face contact (20%) and dealing with enquiries and requests (19%). All of these improvements suggest that, overall, HEFCW has become more accessible to staff in institutions.

4.49 A smaller proportion see improvement in the quality of service (15%) and the involvement of institutions in policy development (11%) although 7% also see a deterioration on this last point.
4.50 Interactions which are considered to have worsened are typically in areas which relate to the ‘workload’ which institutions are required to undertake. Over a third (37%) say that the administrative burden on institutions has worsened whilst a fifth (21%) see deterioration in the timeliness of official requests.

4.51 In addition to the above, other areas which are perceived to have deteriorated relate to HEFCW’s ability to understand and represent the sector. In both cases, around six in ten see no change, almost one in ten see an improvement (8-9%) but almost double say that there has been a decline (15-16%).

4.52 Feedback on some of these issues was gathered during the depth interview phase of work:

**Timing of Official requests**

4.53 The majority of respondents agree that amount of time available to respond to official requests has worsened in the last two years. The volume of requests has increased although many comment that this is largely as a result of the issues which have been facing the sector in the last year.

4.54 The timing of responses often considered very tight and difficult to manage in the context of how institutions operate. For example, not a good fit with committee meeting schedules and holiday periods. This reduces the amount of ‘real’ time available to respond and puts significant pressure on institutions to give full and complete responses.

“In July 2011, four consultations were issued within 24 hours. Three of them had a deadline or 6 to 8 weeks and the fourth had a deadline of 3 months. They need to stagger them out. Sometimes we feel that some consultations have already been decided. Never a good time in August to undertake any consultations.”

“A deadline of one month to complete a consultation is not reasonable. Though I understand that it's politically driven and HEFCW may not be able to control it.”

“Very good at advance warning and this is helpful. But advance notice needs to be accompanied by some detail so that we can get working on it so we know what we’re trying to achieve”.

“Give us more time! We answer in time but we’re forced into giving shallow answers when we would like to give more depth but don’t have time.”
“In an ideal world, they need to provide a bulletin at the beginning of the year to explain and provide an outline of what's expected this coming year in terms of circulars, deadlines etc - we can then work to these deadlines. There are so many changes at the moment that we can't keep up.”

Administration Burden

4.55 Most agree that the administration burden has worsened and that this significantly related to the policies which WG wishes to implement. Several respondents refer to the burden created by fee plans and regionalisation agenda. Others question the number of strategies/monitoring strategies required and an element of ‘micro-management’.

“Most of the burden is driven by the pace of change. Some areas, though, we are doing the same old thing. But there is an increase in information and data required – some of which they need for their role. Have to question whether some of the information/data is ever used or analysed.”

4.56 Respondents suggest that HEFCW could reduce the administration burden through less micro management and having fewer circulars. Better advance planning would be welcomed but it is understood that this is not always something that HEFCW can influence. Some suggest that when there are major issues to be considered, there should be greater dialogue with to look at the impact and perhaps find better way moving forward and providing the relevant information.

“Mostly driven by Government so not much they can do. Put summaries on the front of circulars so can see what they are about and summarise key points.”

“Need to look at what is the minimum necessary – use exception basis of reporting rather than all the detail all the time.”
Changes in service provided to institutions

(Q17) "To what extent do you feel the service HEFCW provides to your institution has got better or worse over the last two years?"

- Much better: 7%
- Slightly better: 36%
- No change: 35%
- Slightly worse: 10%
- Much worse: 2%
- Don't know: 10%

Base: 98

4.57 More than two fifths of respondents (43%) see an improvement in the service provided to their institution whilst just over one in ten (12%) see a deterioration. Around a third (35%) see no change.

4.58 Improvements in relationships were explored further during the follow up interviews. For many, improvements have been recognised in the level of service provided to institutions and the relationships with institutions. Many comment that HEFCW should continue to work on the areas which have improved - approachability, access to staff, effective electronic communications, face to face contact and dealing with enquiries and requests. Areas for further improvement include:

- More client focussed relationship and dialogue with institutions at senior level
- Continue with face to face contact and consultation through regular focus groups and regional stakeholder events
- Dealing with enquiries and requests – some suggestion that this has been slow in some areas e.g. new framework for capped numbers
- Communicate more about areas of HEFCW’s work other than funding.

“Keep up the good work. Focus on developing dialogue particularly face to face. Resolve any issues quickly. Early notification of developments and discussion. Continue to work at the approach they have been taking.”
4.59 HEFCW is considered to be very or fairly effective by at least two fifths of respondents in all aspects of its activities.

4.60 Not all respondents have a view on the effectiveness of every aspect and there are particularly high proportions of 'don't know' or 'no opinion' responses for governance (44%), equality and diversity (43%) and sustainable development (36%). This is unsurprising given the profile of the respondent group and the variety of roles covered.

4.61 HEFCW is particularly effective on policy development and consultation for which almost two thirds (63%) say HEFCW is very or fairly effective.

4.62 Areas which are considered to be not very effective or not at all effective are:
4.63 Further information was gathered on some of these topics during the follow up interviews.

**Representing HE to the Welsh Government**

4.64 Some see HEFCW as the ‘voice for the HE sector in Government’ whilst others believe that HEFCW is implementing Government policy and does not have an independent or advocacy role. There is some suggestion that HEFCW could confront WG more in its role as ‘advisor’ e.g. on funding issues.

4.65 There have been concerns about HEFCW’s ability to effectively represent issues of concern in HE to the Welsh Government on specific issues such as the blueprint for higher education. In some cases there is a feeling that HEFCW advised the minister without having full feedback from individual universities. Some comment that this meant that the document didn’t represent their views fully and that consultation happened after the details had already gone to the Minister.

4.66 To better represent the sector, respondents suggest that HEFCW needs to become more of a ‘buffer’ between institutions and WG. Respondents would like to see evidence that HEFCW is representing the sector. This might include strengthening the relationship and communications between HEFCW and the institutions.

**Support for reconfiguration and collaboration**

4.67 On the support provided on reconfiguration and collaboration some suggest that HEFCW was not as effective as it could have been. Some question whether funding was used strategically and perhaps spread too thinly. The comments point to a need for more clarity and guidance when submitting plans and the provision of better feedback. Support in this area could be improved by having ‘honest conversations’ with institutions about whether or not mergers or collaborations are the best way forward for strategic functions. Gaining a better understanding of each institution and providing a clearer overview of the rationale behind HEFCW’s thinking would be helpful. Institutions would like to see more engagement which would result in more clarity and understanding.
Effectiveness of HEFCW’s other activities for HE sector

*(Q19)* "Again, thinking about the HE sector as a whole, to what extent do you feel the following aspects of HEFCW’s activities are carried out effectively?"

<table>
<thead>
<tr>
<th>Support for widening access</th>
<th>22%</th>
<th>51%</th>
<th>6%</th>
<th>15%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support for Welsh medium provision</td>
<td>18%</td>
<td>53%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Support for enhancing learning and teaching</td>
<td>12%</td>
<td>41%</td>
<td>11%</td>
<td>29%</td>
</tr>
<tr>
<td>Support for enhancing research</td>
<td>10%</td>
<td>37%</td>
<td>13%</td>
<td>30%</td>
</tr>
<tr>
<td>Support for the links with businesses and the community (innovation and engagement)</td>
<td>15%</td>
<td>29%</td>
<td>16%</td>
<td>32%</td>
</tr>
<tr>
<td>Support for the development of the skills and employability of students</td>
<td>14%</td>
<td>27%</td>
<td>20%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Base: 94

4.68 HEFCW is considered to be highly effective at HE sector level in providing support for widening access (73%) and Welsh medium provision (71%). In other areas HEFCW is generally effective according to at least two fifths to a half of all respondents.

4.69 Again, there are high proportions of respondents who have no strong views on effectiveness in these areas.

4.70 Areas where HEFCW is considered to be less effective received a higher proportion of ‘not very’ or ‘not at all’ effective ratings although they remain broadly effective for two fifths of respondents or more. The least effective areas are support for developments in the skills and employability of students (22%), links with businesses and the community (17%) and enhancing research (17%).
Changes in service to HE sector

(Q21) "To what extent do you feel the service HEFCW provides to the HE sector as a whole has got better or worse over the last two years?"

- Much better: 4%
- Slightly better: 31%
- No change: 34%
- Slightly worse: 14%
- Much worse: 4%
- Don't know: 17%

Base: 94

4.71 Just over a third of respondents (35%) say that the service HEFCW provides to the HE sector as a whole has improved in the last two years whilst a third (34%) see no change.

4.72 One in seven respondents (14%) believe that the service has deteriorated in the last two years.
4.73 Overall, just under a third (30%) do not want more contact with any HEFCW staff. Further contact is required with staff involved in reconfiguration and collaboration (23%), student matters (22%), funding (22%), strategic development (21%) and statistics and data collection (20%). These typically reflect the issues which are of current concern to respondents.
Satisfaction with relationship at institution level

(Q23) "Overall, how satisfied are you with the relationship between your institution and HEFCW?"

Base: 94

4.74 Satisfaction levels are relatively high with two thirds of respondents (66%) saying that they are either very or fairly satisfied with the overall relationship between HEFCW and their institution. There are signs of slight improvement overall as the satisfaction level has risen from 60% in the first stakeholder survey in 2008.

4.75 One in ten (9%), however, are dissatisfied to some degree. This is slightly down from 12% in the previous survey.
Changes in relationships at institution level

(Q24) "How has this relationship changed, if at all, over the last two years?"

Base: 94

4.76 More than third (37%) say that HEFCW’s relationship with their institution has improved in the last two years, mostly it is ‘a little’ better. In comparison with the 2008 survey, there is evidence of progress as at that time, 22% thought the relationship had improved.

4.77 A significant minority (13%) take the opposite view and believe that the relationship has worsened. Most of this group consider the relationship to be ‘a little worse’.
Communication channels used

(Q25) "What are the main channels you currently use to find out about HEFCW's activities?"

- Direct contact with HEFCW staff: 83%
- HEFCW Circulars: 82%
- HEFCW website: 71%
- HEFCW conferences/seminars/meetings: 48%
- Informal contact with own colleagues: 47%
- Meetings in your own institution: 38%
- HEFCW Corporate Strategy: 28%
- Information from HEW: 27%
- HEFCW Annual Report: 26%
- Other HEFCW publications and reports: 18%
- HEFCW Newsletter: 18%
- Meetings of professional bodies: 15%
- Your own institution’s newsletters/circulars/reports: 12%
- Welsh and/or HE press: 12%
- Other: 1%

Base: 94

4.78 Three communication channels stand out from the range available. These are direct contact with HEFCW staff (83%), HEFCW circulars (82%) and the website (71%). The newsletter is used by less than one in five (18%) as a main channel of communication.

4.79 The least popular channels are through the media (12%) and institution-based newsletters or communications (12%). The one ‘other’ response relates to ‘franchise partners’.
Preferred communication channels

(Q26) "How would you prefer to be kept informed about HEFCW's activities?"

- Direct contact with HEFCW staff: 73%
- HEFCW Circulars: 59%
- HEFCW conferences/seminars/meetings: 36%
- HEFCW website: 32%
- Meetings in your own institution: 17%
- HEFCW Newsletter: 13%
- Information from HEW: 12%
- Meetings of professional bodies: 7%
- Informal contact with own colleagues: 6%
- No preference: 4%
- HEFCW Corporate Strategy: 4%
- HEFCW Annual Report: 3%
- Other HEFCW publications and reports: 3%
- Your own institution’s newsletters/circulars/reports: 3%
- Welsh and/or HE press: 1%

Base: 94

4.80 Respondents were asked to give up to three preferred communication channels.

4.81 Direct contact with staff (73%) and circulars (59%) were again the most popular choices. HEFCW conferences/seminars or meetings were mentioned by more than a third (36%) and around a third listed the HEFCW website (32%) in their top three communication channels.
4.82 Further information on communications channels was gathered during the second phase of the research:

**Direct contact with HEFCW staff**

4.83 There is continuing need for direct contact with HEFCW staff. This reflects the uncertainty in the HE sector at the moment as there is a need for more understanding, clarity as changes occur and assistance. Institutions see a need for more dialogue and face to face contact as they believe that more can be gained from this process.

“Find the direct contact very useful - very open and pick up things you'd never get through the written communication. It's helpful to have a discussion and argument on occasion. They can explain why they have to do certain things.”

“You really can’t replace direct contact with those other methods. Direct relationships are key - you need that trust and understanding. Without them, both sides lose understanding.”

“Direct contact with staff is good when seeking clarity and discussing matters in more detail. There is plenty information available on website and communication by email is good.”

“HEFCW provide very good information and increasingly rely heavily on electronic communication. Personal contact helps with clarification/understanding/reassurance.”

**Newsletter**

4.84 Feedback on the newsletter suggests that this is not always received by the respondents. It is generally perceived to be a lengthy document which often contains information that is already known through existing contact with HEFCW and circulars/press releases or the website. This leads some to question who the newsletter is aimed at. The newsletter is one among many that people receive and is not necessarily read.

4.85 The format could be revamped to make it more timely, easier to review and a more up to date format in line with electronic communications rather than an electronic copy of a hard copy document. A regular email with links to relevant features would be much more beneficial allowing respondents to scan for issues of interest and follow up by clicking a link which would take them to the full article. Changing the frequency would also allow result in the newsletter being more up to date.
**Circulars**

4.86 The use of circulars to consult with institutions is well received. However, it is best combined with dialogue through seminars or workshops, where appropriate, to allow for a two-way process of communication. Regional briefing events are valued. The extent to which face-to-face consultation should be carried out depends on the importance of the issue e.g. the future shape and structure of the sector should have a lot more dialogue and engagement. HEFCW is perceived to be good at making institutions aware of up and coming issues so circulars generally do not arrive unannounced.

“**Circulars are very variable - it depends on the author! They are important because they give a consistent message, but they need to be accompanied by dialogue.**”

“**Nothing wrong with circulars but sometimes it would be useful to have an informal consultation in order to help draft the circular. Sometimes it can be useful to put out an ‘aunt sally’ to get some responses. Focus groups / workshops have also been used and are useful. HEIs do need to involve themselves with HEFCW and respond.**”
Overall communications with individual institutions

(Q27) "Overall, how well or poorly does HEFCW communicate with your institution?"

Base: 94

4.87 Communications with individual institutions are generally well regarded with 85% respondents indicating that HEFCW communicates very well or fairly well with their institution. This compares with 75% in the 2008 survey.

4.88 7% of respondents believe communication is fairly or very poor.
Respondents are overwhelmingly in favour of the use of new technology in HEFCW’s communications. More than eight in ten (84%) support the use of web-based and electronic communication methods. Just 2% take the opposite view.
Usefulness of communication channels

(Q29) "How useful do you personally find the following?"

<table>
<thead>
<tr>
<th>Communication</th>
<th>Very useful</th>
<th>Fairly useful</th>
<th>Not very useful</th>
<th>Not at all useful</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEFCW circulars</td>
<td>49%</td>
<td>39%</td>
<td>5%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>HEFCW website</td>
<td>31%</td>
<td>51%</td>
<td>5%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>HEFCW funding circulars</td>
<td>48%</td>
<td>32%</td>
<td>7%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>HEFCW consultations</td>
<td>24%</td>
<td>46%</td>
<td>14%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>HEFCW statistical reports</td>
<td>15%</td>
<td>53%</td>
<td>13%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>HEFCW Corporate Strategy</td>
<td>13%</td>
<td>45%</td>
<td>10%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>HEFCW press releases</td>
<td>12%</td>
<td>34%</td>
<td>23%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>HEFCW newsletter</td>
<td>7%</td>
<td>35%</td>
<td>21%</td>
<td>23%</td>
<td>12%</td>
</tr>
<tr>
<td>HEFCW Annual Report</td>
<td>6%</td>
<td>35%</td>
<td>22%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>HEFCW Welsh Language Scheme</td>
<td>26%</td>
<td>18%</td>
<td>36%</td>
<td>14%</td>
<td></td>
</tr>
<tr>
<td>HEFCW Equality Scheme</td>
<td>22%</td>
<td>21%</td>
<td>39%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Estates guidance and requirements</td>
<td>10%</td>
<td>14%</td>
<td>36%</td>
<td>26%</td>
<td></td>
</tr>
</tbody>
</table>

Base: 94

4.90 External communications are generally considered to be useful although the extent is dependent on whether the subject matter is relevant to the individual respondent in some cases.

4.91 The most useful communications are the circulars, website, funding circulars all of which 80% or more respondents rated as very useful or fairly useful. Consultations, statistical reports and the corporate strategy are also rated as being useful by around six in ten or more respondents.

4.92 The communications with the highest level of ‘not very useful’ or ‘not at all useful’ responses are the annual report (27%), press releases (27%), the equality scheme (22%), newsletter (22%) and the Welsh Language Scheme (20%). To some extent this may reflect the relevance of these...
communications to the broad range of roles carried out by respondents. There are a high proportion of 'not applicable' or 'don't know' responses for the communications which are considered to be least useful.

**Use of website**

(Q31) "How often do you access HEFCW's website (www.hefcw.ac.uk)?"

- At least once a week: 15%
- At least once a month: 43%
- A few times a year: 35%
- Never access it: 7%

**Base: 94**

4.93 Respondents use the HEFCW website on a fairly regular basis. 15% are very frequent users who access the site at least once week. Around two fifths (43%) access the website at least once a month.

4.94 Less than one in ten (7%) say that they never access the website.
Feedback on institutional risk and strategic plans

(Q30) "From time to time, HEFCW consults with institutions on more confidential matters. If applicable, how useful do you personally find the following?"

![Pie chart showing responses to Q30]

Base: 69 – institutional risk; 75 – strategic plans

4.95 This question was not relevant to all respondents. Those who indicated that it was not applicable to them have been removed from the base.

4.96 Communications on institutions risk are useful to some degree for around half of the respondents (51%) whilst just under one in five (16%) find them not useful to some degree. A third are undecided.

4.97 Six in ten (60%) find feedback on strategic plans useful to some extent although almost a quarter (23%) do not.

4.98 Comments were also gathered during the depth interviews:

Feedback on Institutional Risk Communications/Strategic Plans

4.99 Feedback on institutional risk communications or strategic plans had a mixed response. This is considered to be helpful for some but not for others. Respondents are often appreciative of the perspective that HEFCW brings particularly when entering into dialogue.

4.100 On Strategic Plans, several comment that they would like to have a discussion before the formal letter is sent back to institutions. Sometimes there are misunderstandings which could be ‘unpicked’ before the official response is sent back.
Further information on HE sector-facing activities

4.101 The three most popular areas that respondents would like to know more about are funding higher education (60%), reconfiguration, collaboration and the structure of the sector (53%) and the fees regulatory role (38%). All of these were investigated further in the follow up interviews.

4.102 Most respondents suggest that any knowledge gaps in these areas result from the changing situation surrounding these issues. These are considered to be such huge issues that the need for further information relates to the uncertainties and likely future impact. Some respondents suggest that there is a lack of understanding of the rationale behind
decisions and policies whilst others comment that there is a communication issue within HEIs to deal with differing awareness levels of these issues amongst staff.

Further information on HE policy activities

(Q33) "Which aspects of HEFCW's HE policy activities, if any, would you like to know more or less about?"

<table>
<thead>
<tr>
<th>Area</th>
<th>More</th>
<th>No change</th>
<th>Less</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher education in further education</td>
<td>45%</td>
<td></td>
<td>47%</td>
<td>6%</td>
</tr>
<tr>
<td>Innovation and engagement</td>
<td>36%</td>
<td>56%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Skills and employability, including GO Wales</td>
<td>36%</td>
<td>52%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Student engagement and representation</td>
<td>34%</td>
<td>54%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Research</td>
<td>32%</td>
<td>59%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Widening access</td>
<td>24%</td>
<td>66%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Welsh medium provision</td>
<td>13%</td>
<td>69%</td>
<td>9%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Base: 94

4.103 The most popular policy topic for further information is higher education in further education (45%).

4.104 Other policy topics have a significant but lower level requirement for further information such as innovation and engagement (36%), skills and employability (36%), student engagement and representation (34%) and research (32%).
Key areas for development

4.105 Respondents were asked to indicate key areas for improvement for the next three years across any of the topics covered in the survey. Comments were made by around a third of respondents and were grouped into the following themes:

- Engagement and relationships with institutions
- Representation of the Welsh HE sector to Welsh Government
- Funding and fees
- Other areas for development

Engagement with institutions

4.106 A significant number of comments were made concerning the relationship that HEFCW has with institutions and the level of general engagement and approach that is adopted. Many call for a greater partnership approach to the relationship. A selection of these comments are presented below:

"More consultation with the sector should be a top priority."

"HEFCW should be more approachable and supportive of institutions. My overall experience is of a body that does things the way it wants without recognising institutional diversity and without getting to know key staff well enough to understand institutions and their strengths and specific requirements. HEFCW comes over as a relatively unfriendly audit and compliance body, not a partner in delivering HE to the people of Wales. [There has been a more] positive experience of HEFCE in England which appeared to want regular friendly dialogue with institutions. I would suggest that HEFCW officials should get out and about more, for informal meetings with institutions to keep up to date with the issues they are facing in a non-threatening way."

"Just to continue providing good communication to institutions."

"More face to face communication with a broader range of staff in HEIs. More research and networking opportunities for staff on areas relating to employability and innovation. More contact with a broader range of staff in HEIs, as senior staff in HEIs are often very poor at sharing information with middle management colleagues"

"More direct communication - face to face. Build relationships not just communications"

"Working with institutions to meet WG targets and to address priority areas."


“A greater engagement (and understanding) about the student experience to help institutions meet the significant challenges ahead.”

“Visits to the institution for discussion of issues, when possible, are appreciated. An increase in visits by the Chief Executive or Directors could be valuable.”

“Communicating with a wider variety of staff within institutions not just the "admin" role people.”

“Working in partnership with institutions through what could be a difficult three year period. However, by partnership this does not need to mean an increase in bureaucracy.”

“Developing a mutually respectful working relationship with Institutions.”

“Improved communications with organisations - website, individual contact, improved and more interactive workshops/briefings”

Representation of the HE sector to the Welsh Government

4.107 Many suggest that HEFCW’s representation of the HE sector to the Welsh Government could be stronger:

“Be a better advocate for the Welsh HE institutions”

“To demonstrate its independence from the Welsh Government, to help and encourage Welsh universities to be more innovative and effective with funding allocated (by HEFCW) to HEIs, and to help build research capacity.”

“Representing to WAG the effect of WAG policies on the sector.”

“Becoming a stronger voice for higher education when dealing with the Welsh Government”

“A supportive approach to the sector during a period of exceptional challenge and associated risk. Evidence that HEFCW plays a more effective advocacy role with the Welsh Government.”

“Influencing Welsh Government policy through evidence-based information on the sector’s performance”
“Becoming an influential source of information and advice to the Welsh Government on how universities can support Wales in delivering improvements in education, health, economic development, etc.”

“Ensuring that the advice to the Welsh Government is accepted particularly in policy development which could have a major impact on the HE sector in Wales and our competitive position with regards to the rest of the UK and further afield.”

Funding and Fees

4.108 These comments reflect the current changes relating to funding mechanism and concerns over the implications for how this will develop in the next few years:

“With the inception of greater direct funding HEFCW should provide quality monitoring and advice in all areas, not just academic issues, to provide the sector with advice on Government Policy and matters of Governance. One of the biggest concerns from a Financial point of view will be the balance of expenditure to ensure that the support services are adequately funded and in particular that the University Estate does not suffer from neglect.”

“Help and encourage Welsh universities to be more innovative and effective with funding allocated (by HEFCW) to HEIs”

“Explanation of new fee structure; more information on the rationale behind reconfiguration.”

“Direct funding for HE in FE in the context of regional change”

Other issues

4.109 Other comments raise issues which do not fall into the broad themes outlined above including the administration burden and policy development:

“Addressing the burden on institutions, particularly in relation to the timing of Circulars and associated response dates.”

“Lightening the bureaucratic load as promised so often before.”

“More consistency and coordination between drafting officers for the writing of circulars. More realistic and flexible views on impact assessment for
widening access activity Setting deadlines and responding to plans prior to the start of an academic session”

“Prioritisation of key policy development and implementation areas and being prepared to stop doing lower priority activities.”

“Far more emphasis on the strategic and sustainable planned development of the HE sector in Wales - what is the vision for HE in Wales for the next 3-4 years?”

“Focus on the REF and research agenda as well as the proposed restructuring of the sector.”

“Timely communication - in respect of assurance visits and provision of reports (example: 4-6 weeks’ notice of assurance visit given, 5 months to provide draft report to institution).”
Profile of Respondents

(Q35) "What post do you currently hold in your institution?"

- Director / Head of Service: 27%
- Other administrative post: 20%
- Deputy / Pro Vice-Chancellor: 9%
- Vice-Chancellor / Principal: 9%
- Head of Administration / Registrar: 5%
- Head of Faculty / School: 4%
- Head of Corporate Communications / Communications / Marketing Director: 4%
- Clerk to the Council: 3%
- Chair of Council / Governing Body: 2%
- Dean: 2%
- Head of Department (academic): 1%
- Deputy/Assistant Principal: 1%
- Other: 13%

Base: 94

4.110 Respondents to the institution survey came from a variety of backgrounds and included both senior level staff and operational staff.
5. Feedback from Partners

5.1 This section of the report contains the details of the responses from the Welsh and UK Partners that were consulted during the survey.

5.2 The findings cover the following topics:

- Awareness and views of HEFCW
- Awareness and views of other related organisations
- Perceptions of HEFCW
- Contact and dealings with HEFCW
- Communication
- Respondent profile
Awareness and Views of HEFCW

Awareness of HEFCW’s work

(Q2) "How well do you feel you know about the work of HEFCW?"

- Know very well: 24%
- Know a fair amount: 57%
- Know a little: 19%

Base: 42

5.3 All Partner respondents are familiar to some extent with the work of HEFCW. More than eight in ten (81%) say that they know very well or know a fair amount about the work of HEFCW.

Overall opinion of HEFCW

(Q3) "Which of the following best describes your overall opinion or impression of HEFCW?"

- Very favourable: 29%
- Mostly favourable: 55%
- Neither favourable nor unfavourable: 17%

Base: 42

5.4 Overall feedback is very positive as more than four fifths (84%) of respondents have a favourable impression of HEFCW.
### Awareness of the work of other HE related organisations

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Know very well</th>
<th>Know a fair amount</th>
<th>Know a little</th>
<th>Heard of, but know nothing about</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept. for Business Innovation and Skills (BIS), UK Government</td>
<td>29%</td>
<td>40%</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>UCAS</td>
<td>26%</td>
<td>38%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Dept. for Education and Skills, Welsh Government (DFES)</td>
<td>40%</td>
<td>21%</td>
<td>31%</td>
<td>7%</td>
</tr>
<tr>
<td>Research Councils UK</td>
<td>19%</td>
<td>38%</td>
<td>31%</td>
<td>12%</td>
</tr>
<tr>
<td>Higher Education Statistics Agency (HESA)</td>
<td>19%</td>
<td>38%</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td>Quality Assurance Agency for Higher Education (QAA)</td>
<td>19%</td>
<td>38%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>Universities UK (UUK)</td>
<td>29%</td>
<td>26%</td>
<td>33%</td>
<td>12%</td>
</tr>
<tr>
<td>Higher Education Academy (HEA)</td>
<td>14%</td>
<td>36%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>Dept. for Business, Enterprise, Tech &amp; Science, Welsh Government (BETS)</td>
<td>26%</td>
<td>21%</td>
<td>19%</td>
<td>26%</td>
</tr>
<tr>
<td>Leadership Foundation for Higher Education</td>
<td>17%</td>
<td>26%</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>Higher Education Wales (HEW)</td>
<td>17%</td>
<td>24%</td>
<td>40%</td>
<td>12%</td>
</tr>
<tr>
<td>Student Loans Company (SLC)</td>
<td>12%</td>
<td>29%</td>
<td>43%</td>
<td>17%</td>
</tr>
<tr>
<td>Equality Challenge Unit (ECU)</td>
<td>10%</td>
<td>12%</td>
<td>17%</td>
<td>33%</td>
</tr>
<tr>
<td>Committee of University Chairmen (CUC)</td>
<td>10%</td>
<td>38%</td>
<td>21%</td>
<td>26%</td>
</tr>
<tr>
<td>Chairs of Higher Education Wales (CHEW)</td>
<td>10%</td>
<td>40%</td>
<td>31%</td>
<td>17%</td>
</tr>
</tbody>
</table>

**Base: 42**

5.5 Awareness of other HE related organisations is influenced by the location of partner respondents some of which are Wales-based whilst others are elsewhere in the UK.

5.6 Respondents are most familiar with the UK Government’s Department for Business, Innovation and Skills and 69% say they know about its work either very well or a fair amount. UCAS and the Welsh Government’s
Department for Education and Skills are also well recognised by around six in ten. Respondents know more about the work of HEFCW than any of these other organisations.
Overall opinion of other HE related organisations

(Q5) "For those organisations that you know at least a little about, please indicate how favourable your overall opinion or impression of each is."

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Very unfavourable</th>
<th>Mainly unfavourable</th>
<th>Neither favourable nor unfavourable</th>
<th>Mostly favourable</th>
<th>Very favourable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadership Foundation for Higher Education</td>
<td>8%</td>
<td>20%</td>
<td>48%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>Equality Challenge Unit (ECU)</td>
<td>25%</td>
<td>6%</td>
<td>38%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Dept for Education and Skills, Welsh Government (DfES)</td>
<td>32%</td>
<td>32%</td>
<td>58%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>Universities UK (UUK)</td>
<td>39%</td>
<td>39%</td>
<td>39%</td>
<td>22%</td>
<td></td>
</tr>
<tr>
<td>Dept. for Business, Enterprise, Tech &amp; Science, Welsh Government (BETS)</td>
<td>33%</td>
<td>7%</td>
<td>39%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>Higher Education Academy (HEA)</td>
<td>38%</td>
<td>10%</td>
<td>48%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Research Councils UK</td>
<td>44%</td>
<td>17%</td>
<td>39%</td>
<td>17%</td>
<td></td>
</tr>
<tr>
<td>Higher Education Statistics Agency (HESA)</td>
<td>39%</td>
<td>7%</td>
<td>43%</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Quality Assurance Agency for Higher Education (QAA)</td>
<td>6%</td>
<td>39%</td>
<td>30%</td>
<td>24%</td>
<td></td>
</tr>
<tr>
<td>UCAS</td>
<td>45%</td>
<td>15%</td>
<td>38%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Dept. for Business Innovation and Skills (BIS), UK Government</td>
<td>48%</td>
<td>10%</td>
<td>30%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Higher Education Wales (HEW)</td>
<td>52%</td>
<td>18%</td>
<td>30%</td>
<td>18%</td>
<td></td>
</tr>
<tr>
<td>Committee of University Chairmen (CUC)</td>
<td>59%</td>
<td>9%</td>
<td>32%</td>
<td>9%</td>
<td></td>
</tr>
<tr>
<td>Student Loans Company (SLC)</td>
<td>89%</td>
<td>7%</td>
<td>62%</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Chairs of Higher Education Wales (CHEW)</td>
<td>81%</td>
<td>19%</td>
<td>24%</td>
<td>24%</td>
<td></td>
</tr>
</tbody>
</table>

Base variable due to routing: 21-40 respondents

5.7 The most well-regarded organisations overall are the Leadership Foundation for Higher Education, Equality Challenge Unit, DfES (WG) and UUK all of which are considered very or mostly favourable by six in ten or more respondents. Almost three quarters of respondents (72%) have a favourable impression of the Leadership Foundation for Higher Education. None of these organisations match HEFCW for which 84% have a favourable impression.
### Perceptions of HEFCW’s role

**(Q6) “Thinking about HEFCW’s current role, how strongly do you personally agree with each of the following statements?”**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly agree</th>
<th>Tend to agree</th>
<th>Neither agree nor disagree</th>
<th>Tend to disagree</th>
<th>Strongly disagree</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEFCW works in partnership with other HE sector bodies</td>
<td>45%</td>
<td>45%</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW works in partnership with the institutions it funds</td>
<td>53%</td>
<td>35%</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW effectively responds to policy changes</td>
<td>40%</td>
<td>43%</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW is an agent of the Welsh Government</td>
<td>38%</td>
<td>43%</td>
<td>13%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW takes account of the effects of its requirements on institutions’ resources</td>
<td>28%</td>
<td>50%</td>
<td>15%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW actively supports &amp; encourages institutions to improve and progress sustainable development</td>
<td>30%</td>
<td>45%</td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW actively promotes the fulfilment of equalities legislative requirements</td>
<td>33%</td>
<td>40%</td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW takes institutional diversity into consideration when allocating funding</td>
<td>25%</td>
<td>48%</td>
<td>23%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW is increasingly a planning agency</td>
<td>18%</td>
<td>50%</td>
<td>25%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW is an advocate or spokesperson for the HE sector</td>
<td>25%</td>
<td>38%</td>
<td>15%</td>
<td></td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>HEFCW is primarily a regulatory body</td>
<td>25%</td>
<td>28%</td>
<td>30%</td>
<td>13%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Base: 40**
5.8 Views are fairly consistent on HEFCW’s role amongst partners with few areas showing conflicts in overall perceptions. Around nine in ten respondents agree that HEFCW works in partnership with other HE sector bodies and with the institutions that it funds.

5.9 Eight in ten (81%) believe that HEFCW is an agent of the Welsh Government but almost two thirds (63%) believe that it is an advocate or spokesperson for the HE sector. Almost a quarter (23%) disagree with this last point.

5.10 Two thirds (68%) agree that HEFCW is increasingly seen as a planning agency. This is up from around half in 2008.

5.11 Opinion is mixed on whether HEFCW is viewed primarily as a regulatory body with 30% agreeing that it is and 43% disagreeing.

5.12 Further detail behind perceptions of HEFCW’s role was investigated in the follow up interviews, specifically:

- role as agent of Welsh Government and increasingly as a planning agency
- opposing views on ‘regulatory body’ role
- mixed views on the advocate or spokesperson role

Agent of Welsh Government / Planning Agency

5.13 Views are mixed over whether the increasing planning role is seen as a positive or negative development. Half see take a positive view, a third are neutral and the remainder are either mixed or see it as a negative development. There is recognition that this role has developed and is changing in the light of recent consultations and that planning at a strategic level is likely to be something that HEFCW will become more involved with.

“It is perfectly appropriate for HEFCW to act as a planning agency as long as it is executing the collective mind of the universities in a democratic way rather than autocratic. It is generally becoming more autocratic and may need to be reined in a little. Its first role is to distribute funding that the government provides to the universities. This brings regional and other tensions. You can put all eggs in one basket or channel funding into pockets of excellence wherever they may be. It is possibly too much in one direction at the moment. Quality should be the aim.”

“It’s an inevitable change in perception. It reflects what WG are requiring HEFCW to do. WG is committed to re-organising HE sector and HEFCW is bound to be more involved in planning than before.”

“If at the strategic level then it’s positive and it’s probably inevitable. HEFCW is now in a weaker position as a funding body with changes in funding – students are the purse holders.”
“It’s a positive development but HEFCW don’t do this as well as they could. They need to be stronger. There is a need to ensure that funding is spent effectively and the stability of the sector is maintained so that there are no ‘glitches’ in delivery of services. They can’t achieve this unless they are a planning agency for HE in Wales. Planning assumptions need to be set out and be uniform for the sector otherwise there is no coordination or consistency within the sector. HEFCW have to work within the policy and direction set by WG and balance this with what is happening on the ground.”

“It depends on degree of planning - if giving an overall steer that’s fine but if it gets too detailed it may get too heavy handed but a more co-ordinated approach is useful. Would see planning as being more prominent in the last few years and moving forward. Officially HEFCW is not a planning body – the Minister has set out his stall for HE and HEFCW has responded to that. HEFCW has taken forward thoughts on the structure to the Minister – ‘All our Futures’.

“HEFCW should be independent but they’re becoming a mouthpiece of the Government”

“HEFCW role as a planning agency must reflect the WG role and therefore it will change. There needs to be a coherent HE landscape whether HEIs merge or not. HEFCW will have to play a more overt role. HEFCW could do this well but it will be difficult. My anxiety is where does planning become direction which is contrary to autonomous HEIs.”

Perceptions of HEFCW as a regulatory body

5.14 Results from the online survey suggested that opinions were divided as to whether HEFCW is viewed primarily as a regulatory body or not. Further clarification on what respondents understand by term ‘regulatory body’ were sought in the follow up interviews.

5.15 Most suggest that HEFCW’s regulatory role is specifically related to how public funding is distributed and some say it relates to the regulation of student numbers. A few suggest that the role includes ensuring that quality is delivered through HE. A few also suggest that the regulatory requirements in HE are not as strict as for other sectors.

“To make sure public money is well spent - makes sure Welsh pound is used properly. It’s about value for money, about quality of what Universities offer and making sure that funding is invested in best way. There should be regulation at the level of risk - don’t want huge levels of regulation and micro management.”

“I come from a sector where there is very strong regulation. HEFCW really isn’t in that same ‘regulatory league’ at all.”
“In planning and a financial sense they are a regulatory body – numbers of students are regulated.”

“HEFCW should be able to check that HEIs are delivering appropriate courses for young people to progress into high quality jobs.”

“Regulatory body is mainly around monitoring student numbers etc. not about standards. HEFCW has a duty to make sure that funding is spent on what it is intended for. If clear planning assumptions then it is better placed to do this.”

“Keep the HEIs in some sort of order – control of finance, targets and quotas with WG. Part performance related. A need to oversee things and to step in or identify potential problems by non-Government body.”

“A regulatory body has powers and tools available to make organisations comply with rules. So HEFCW is regulatory in terms of funding because it has levers available should it need to use them if money is misused or a university is in disrepute.”

“It has to be a regulatory body because it's responsible for public funding.”

“There has to be some regulation and accountability attached to public money spent by HEIs without telling universities exactly what to do. Some people get frightened about regulatory role in the context of autonomy. A lot depends on the trust between HEIs and HEFCW. It works differently in different parts of the UK”

Advocate or spokesperson for the HE sector

5.16 Further feedback was gathered on the reasons why there were mixed views on HEFCW acting as an advocate or spokesperson for the HE sector.

5.17 Many see HEFCW as an advocate or intermediary to represent the interests of the HE sector rather than individual institutions to WG. Several comment that the ‘representation’ role is not as outwardly visible as it is for HEW:

“I see it as an advocate. HEFCW has to work closely with WG and present what it feels the sector needs. Those who think it's not an advocate may be dependent on the level of contact they have with HEFCW and the level of involvement. When sitting down with WG - HEFCW is taking a view from the HE sector and not going in cold. They do a lot of consultation with the sector. They act as an intermediary.”
“There is some tendency to autocracy - some people see them as that rather than being spokespeople for the community that they serve. There is some suggestion in the press that HEFCW is taking on life of their own. They are there to serve the needs of the community - there needs to be some recalibration of this.”

“It is acting as an advocate/spokesperson but much of what it does is not visible, hence why some disagree. People would miss HEFCW if it wasn’t there. It’s HE Wales’ role to be a visible advocate, not HEFCW’s though.”

“I think they definitely have become a spokesperson for the sector. The media want a slant on HE policy and HEFCW are the only ones they can turn to give one voice for the sector.”

“It’s difficult for a regulator to be an advocate but at the same time they do have that dual remit of regulation and championing the HE sector. The conflicting roles mean difference in opinion about its advocacy.”

“Not sure that HEFCW is an advocate body. Some would say that HEW is the body that is an advocate.”

“I see HEFCW as an advocate for the sector but they are not as overt as HEW. I’ve always had the impression of HEFCW as acting on behalf of the sector. HEFCW has the sector health in mind as well as being critical when needed. They act responsibly.”

“Like any regulatory body it depends where respondents sit or fit. HEFCW represent HE and come to WG with issues. However they also represent the views of WG and there will always be some tensions.”

“I don’t think that HEFCW see their role as the spokesperson for the sector. It’s best to keep spokesperson role very low key. HEFCW identify with the sector but are constrained by their remit and Governance from WG. HEFCW may not always be seen in representing the sector - they principally act on behalf of the WG rather than the HE sector. The larger institutions in HE can quite adequately defend themselves. There’s a question mark over the smaller ones.”
Respondents were asked to look at a series of two contrasting phrases or adjectives and indicate which most closely matched their opinion when thinking of HEFCW as a whole. They were also asked to indicate to what extent they felt HEFCW exhibits each attribute i.e. very or fairly. A neutral option was provided for those who had no strong views either way.

Overall perceptions are generally good and for most attributes HEFCW is rated positively by over half respondents. More than eight in ten consider HEFCW to be approachable (85%) and effective (83%) whilst around
seven in ten say it is responsive (71%), in touch with the institutions it funds (71%) and respected (68%).

5.21 The most significant negative viewpoints are that HEFCW is bureaucratic (43%), not transparent (18%), slow to change (18%) and out of touch with the institutions it funds (13%).

Other perceptions of HEFCW

<table>
<thead>
<tr>
<th>Rating</th>
<th>Quality of the body of staff</th>
<th>Fairness and transparency in applying HE policy</th>
<th>Reputation amongst institutions in the HE sector in general</th>
<th>Prominence of HEFCW’s media profile</th>
<th>Effectiveness of HEFCW Council</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very good</td>
<td>55%</td>
<td>28%</td>
<td>10%</td>
<td>40%</td>
<td>10%</td>
</tr>
<tr>
<td>Fairly good</td>
<td>23%</td>
<td>43%</td>
<td>48%</td>
<td>15%</td>
<td>35%</td>
</tr>
<tr>
<td>Some good, some poor</td>
<td>10%</td>
<td>10%</td>
<td>15%</td>
<td>20%</td>
<td>13%</td>
</tr>
<tr>
<td>Fairly poor</td>
<td></td>
<td></td>
<td>18%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very poor</td>
<td></td>
<td></td>
<td>18%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don’t know</td>
<td></td>
<td></td>
<td>18%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not applicable</td>
<td></td>
<td></td>
<td>18%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: 40

HEFCW Staff & Council

5.22 HEFCW performs particularly well on the ‘quality of the body of staff’ where almost eight in ten (78%) of respondents give a ‘very good’ or ‘fairly good’ rating. None of the respondents consider the staff quality to be poor or very poor.

5.23 A high proportion of respondents have no view on the effectiveness of the HEFCW Council (43%) most likely due to limited contact. However, almost half of the remainder (45%) give a positive rating of very good or fairly good. Again, there are no poor ratings from any respondents.
Transparency & Reputation

5.24 HEFCW is perceived to be fair and transparent when applying HE policy as around seven in ten (71%) of respondents rate this positively. None of the respondents had overtly negative opinions on this issue.

5.25 Opinions are slightly mixed on HEFCW’s reputation amongst institutions in the HE sector in general with almost six in ten (58%) giving a positive rating but a small minority (8%) suggesting that this HEFCW’s reputation fairly poor.

Media Profile

5.26 There is a mixed view on the prominence of HEFCW’s media profile. Almost half of the partner respondents consider HEFCW’s profile to be either ‘very good/fairly good’ (45%) whilst almost a quarter (23%) consider it to be ‘very poor/poor’.
Providing Feedback to HEFCW

(Q9) "Based on my experience, I have the opportunity to provide feedback to HEFCW on the work it does:"

- Strongly agree: 43%
- Agree slightly: 40%
- Neither agree nor disagree: 13%
- Disagree slightly: 5%

Base: 40

5.27 On the whole, partners are positive about providing feedback to HEFCW on its work. More than eight in ten (83%) agree that they are given the opportunity to do so. A small proportion disagree (5%).

(Q10) "Based on my experience, I feel HEFCW acts (or will act) on the feedback it receives from its external stakeholders and partners:"

- Strongly agree: 50%
- Agree slightly: 28%
- Neither agree nor disagree: 18%
- Disagree slightly: 5%

Base: 40

5.28 HEFCW is perceived to be responsive to the feedback it receives. More than three quarters (78%) agree that stakeholder feedback will be acted on. A small number of partners disagree (5%).
Satisfaction with relationship with HEFCW

(Q11) "Overall, how satisfied are you with the relationship between your organisation and HEFCW?"

![Bar chart showing satisfaction levels]

**Base: 40**

5.29 Satisfaction levels are high amongst partner stakeholders with more than eight in ten (83%) suggesting that they are very or fairly satisfied with the relationship between their organisation and HEFCW.

5.30 Just under one in ten (8%) are undecided and the same proportion are neutral. This is unsurprising given that some partners may have little contact with HEFCW.

5.31 Just one respondent indicated that they were fairly dissatisfied (3%).
Changes in relationships

(Q12) "How has this relationship changed, if at all, over the last two years?"

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A lot better</td>
<td>18%</td>
</tr>
<tr>
<td>A little better</td>
<td>15%</td>
</tr>
<tr>
<td>Neither better nor worse</td>
<td>57%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>10%</td>
</tr>
</tbody>
</table>

Base: 40

5.32 For more than half of the partners (57%), there is little change in the relationship with HEFCW. A third (33%), however, have seen an improvement in the relationship in the last two years. None of the respondents suggest that the relationship has worsened.

How have relationships changed?

5.33 The nature of how relationships have changed was explored further in the follow up interviews with partners.

5.34 Most respondents recognise a change in approach from HEFCW giving the opportunity to have open and honest dialogue and making staff accessible. Some comment that this has developed because of the need to discuss policy issues within HE in the last few years. A small number comment that maintaining these relationships will be a key challenge in the future:

“We now meet the Chief Executive of HEFCW and didn’t used to. Also meet officials and get invited to annual meetings where can have strategic dialogue. This helps to shape thinking and future opportunities and ideas for collaboration. If there’s more information needed on anything, the response from HEFCW is quite quick and you can reach them on the phone.”
“HEFCW has had to talk more privately to institutions and they obviously appreciate this - they now understand more of what HEFCW is about. HEFCW has tried to respond differently to its counterpart in England.”

“I agree it’s got better. There’s a refreshing openness and transparency - it makes for a healthier relationship and healthier debate. There’s less of a hidden agenda than there was. Credit to the staff for that.”

“I have dealt with different people from HEFCW over [many years] and all were extremely supportive and they still are. Now there is much more pressure on finance and budgets are more rigid and the situation is more challenging.”

“The relationship has been good even in very testing times recently. HEFCW have integrity and there is an open and honest dialogue. It’s good to know there is strength within HEFCW. Would like to see this situation continue in terms of strength of relationship.”

“With all the changes in the past two years it probably means the HEFCW and HEIs have had to talk more. There has been more communication and this has helped develop better relationships. HEFCW are seen to be trying and WG have tried hard and are tasked with more engagement which has to be evidenced. Might be issues in future if student quotas are not adhered to and sanctions have to be introduced.”

**Improving relationships**

5.35 Views were also sought on what more HEFCW could do to continue to improve relationships with partners:

5.36 The key feedback was to ensure that HEFCW continue to engage in open and honest dialogue with partners and institutions. Some suggest that HEFCW staff could get out and meet people although this is understood to happen in some cases. Several comment on the effect of changes in the sector on future relationships.

“The fees based rather than grant based funding will change relationships because HEFCW will be passing over funding on behalf of the loans company. This will change the nature of the relationships with institutions and this needs to be kept fully in mind. On the issue of fees in England - HEFCW will have to change how it operates – I’m uncertain how this will change things. There’s a lot of uncertainty around at the moment which has an impact on those relationships.”
“Relationships are built on people talking to people. If representatives of HEFCW got out and about and talking to people it would improve relationships.”

“It takes time, close relationships, but they're squeezed for staff and that's what they really need more of to improve relationships.”

“Keep up the very good staff contact and approachability”

“HEFCW attending events and speaking. It is useful to get thoughts from HEFCW it helps develop a better understanding of what they are wanting from us and what we want from them.”

“Difficult to know how to answer this if role is changing. In their current role our working relationship is very positive.”

“Dialogue. You need two willing parties to improve a relationship. You can have the best systems but you need personalities on both sides to make it work. HEFCW have made me feel very involved, they’ve been great.”
5.37 Partners use a wide range of communication channels to find out about HEFCW’s activities. Direct contact with HEFCW staff is the most popular route with virtually all (95%) using this channel to find out about HEFCW’s activities. Six in ten (60%) keep up to date with developments through the website which is up from 49% in 2008.
5.38 As would be expected, circulars are less commonly mentioned by partners compared to institutions but are still a used by more than two fifths (43%).

5.39 A quarter keep track through Welsh or HE press (25%). Whilst just under a fifth (18%) currently use the HEFCW Newsletter.

Preferred communication channels

(Q14) "How would you prefer to be kept informed about HEFCW’s activities?"

- Direct contact with HEFCW staff: 93%
- HEFCW website: 40%
- HEFCW Circulars: 28%
- HEFCW conferences/seminars/meetings: 28%
- HEFCW Newsletter: 23%
- Meetings in your own organisation: 15%
- HEFCW Annual Report: 10%
- HEFCW Corporate Strategy: 10%
- Other HEFCW publications and reports: 10%
- Information from Higher Education Wales: 8%
- Informal contact with own colleagues: 3%
- Welsh and/or HE press: 3%
- Your own organisation’s newsletters/circulars/reports: 3%
- Other: 3%

Base: 40

5.40 Respondents were asked to indicate their ‘top three’ preferred methods of communication. Most are in line with the channels which are currently used with direct contact, the website, circulars and seminars/conferences...
being the most preferred routes. However, almost a quarter would like to be kept informed through the HEFCW newsletter which is higher than the 18% who currently use this route. There is some evidence from follow up activities some respondents have not knowingly received the newsletter.

**Importance of direct contact**

5.41 Further understanding on the reasons for the importance of direct contact in keeping people informed was explored during follow up interviews. Respondents were also asked to indicate if this pointed to any shortcomings in other communication channels.

5.42 Most agree that direct contact, and where possible face to face contact, is critical to building relationships, finding solutions and enhancing engagement and understanding of issues. Many comment on the usefulness of other communication channels such as the website but make it clear that these other routes cannot replace the need for personal contact. Often the context and rationale behind communications may not be clear in information communicated in other ways and direct contact allows a full understanding to be achieved.

“Direct contact gives a tailored message with nuances. The problem with publications, websites etc is that it’s a single standardised message, generic, impersonal, no ‘this is how you should interpret this’.”

“Because it’s interactive. Sometimes you ask the wrong questions and you get an answer back which makes you refine the question and eventually get to where you want to be. This is much more difficult when not relating directly to people. You don’t always know the question - you’ve got a problem but can’t articulate the question - direct contact allows this to process to take place. It’s common in the public sector. Building relationships also takes place through this process. It’s not that other routes are lacking, necessarily. The website very comprehensive for what should be on a website - you’ll never find all the answers to your questions on a website, but it’s good for what it is. It’s important to have free access to talk to people to discuss issues. HEFCW need to be out and about and come in on a more informal basis - talk with people rather than at people. This would help the relationship to grow.”

“It’s not true that there’s anything missing from other routes. They still play a role but you have to understand that other routes cannot replace direct contact with staff. It’s so critical. You need direct contact with human beings to build up trust and make queries and build relationships. You can’t do that with technology.”
“You need that eyeball to eyeball contact. People want to hear it from the horse’s mouth and not have to trawl through reams of paperwork. The staff are first class - very accessible and highly supportive.”

“At a senior level, you get bombarded with stakeholder information from all sorts of organisations – it’s difficult to sift out what’s important. Personal contact/personal phone calls are the best routes to give senior level staff the information they really need.”

“The same would be for any organisation – face to face contact always helps. They are very good at other communications - circulars are regular and open. Direct contact can often be a shortcut and is reassuring on understanding. We have meetings several times a year which colleagues and HEFCW attend. This is a good forum for exchange of views and information.”

“It improves communications, can shorten timescales, resolves issues etc. You are able to correct any mistakes. It’s best to have a mix of all sorts of communications. The rest of the communications are good. Receive circulars on a regular basis. HEFCW know their stuff and talking to them is helpful”

5.43 Respondents were asked to comment on changes made to the newsletter and whether or not they see an improvement.

5.44 Whilst very few respondents were critical of the newsletter, several mention that it is one of many that they receive and that it may not always be read. Not all respondents recall receiving the newsletter whilst others suggest that they tend to have a brief look but don’t necessarily look in detail. Some comment that the ‘summary’ approach useful whilst others say that the information included is sometimes not new to them.

“I don’t really read just glance. Issues contained are in other papers I see, but other colleagues may get more benefit.”

“I do read it. I find it good. It’s a good summary and reminder of what’s going on if missed something. It’s sent out to named individuals which is good.”

“It has improved but bearing in mind I receive newsletters from 20-30 organisations it can be a bit overwhelming. I have to be selective in which ones I read but I do read the HEFCW one, though. It’s well presented, laid out, invites and so on. Could possibly have editions focussing on specific
issues - new fees regime topic but not turning it into an academic journal. A more themed approach might be useful on occasion but not all the time."

“It’s ‘okish’ but bit descriptive, reportage and it's out of date because too infrequent"

5.45 Thoughts on how the newsletter could be improved were requested. Very few respondents had much comment to make here. Those that did comment refer to possible topics and suggest that the length of the newsletter should be revisited. Given that a number commented on the multitude of newsletters they receive, the length and format could be adapted to make access to the information more straightforward, perhaps.

“Simpler, shorter, more frequent. Give links so people can read in more depth about the bits they want to read - don’t try and tell everything upfront. Needs to be up to date, so more frequent.”

“Eastern countries - need to look at what they are doing. More realistic information and more dialogue.”

“Don’t always read it – usually skim across content. It has improved – it’s a mixed bag, some things are of interest. The main problem is time to read. Thinks they do OK – all newsletters/communications rarely get great press from recipients.”

Feedback on circulars

5.46 Views on the circulars were also explored during the follow up interviews. Not all respondents recall seeing circulars. Where they are recalled, the response is generally positive to the content and format. Several comment on the usefulness of the summary, appropriateness of the general format of the document and the inclusion of contacts for further information. A few comments suggest that the language used in some circulars could adopt a less ‘jargonistic’ and formal tone.

“My impression is that they are more readable and shorter and to the point than a few years ago. Well written and clear. There’s always a named person to contact should you need further information. They provide a useful structure. If they are part of a consultation – they are important and from time to time there's a meeting to discuss too and these other routes to access to information are needed in addition to the circular.”
“Ideally, PowerPoint presentation or Executive Summary would suit rather than types of circulars which come out at the moment. Some are too verbose - too much detail. Don't mind having the detail as well but need to send with a summary - 1-2 pages. It would be best if both documents were sent so you could refer to detail if required. They should use clear concise simple English - sometimes it's not - there’s a bit too much 'impressive' language and HEFCW jargon.”

“Circulars are important because some communication needs a standardised message. The danger with too much individual contact is that people start hearing what they want to hear. You need both forms. Current circulars are good as they are.”

“Useful but very formal language. They are valuable documents – as clear as they need to be.”

“They are a useful benchmark for checking aspects of policy if you need to go back to something”

“Circulars are regular and open.”

“Good to get them directly by email. Pretty effective. Summaries are good and useful.”

“I don’t necessarily read them all. They are well presented and easy for me to select what I need to read from the summary. Serve their purpose really well.”

Feedback on media presence

5.47 On media coverage, most feel that HEFCW should use PR to inform on major developments and policy issues but otherwise should keep a relatively low profile.

“Yes I would welcome it because I'm based in England so have to search for information. The HE press talk about England not Wales.”

“For public sector bodies – the media presence has to be quite contained and targeted - not self promoting. Tell people what's going on and what they need to know about changes.”

“It could muddy its regulatory powers if it’s in the media too much. It should not be a goal in itself, only when necessary to step in and give a voice when there’s a problem being reported.”
“For the body it is I think the level of coverage is appropriate. There were some articles last year in the Western Mail which were good. Content should be factual and comments should be HEFCW’s views.”

“They probably should be in the media more but then it depends whether they’ve got the freedom to speak independently or whether they’re just reading a government script. If they’re just a mouthpiece of the government then there’s no point them being in the press.”

“ Might be healthy to have greater media presence if it has a more regulatory role. This would help understanding. The media should not be used to ‘bang the drum’ for HEFCW. Use for achievements of the sector and regulation.”
Perceptions of Communication

(Q15) "Overall, how well or poorly does HEFCW communicate with your organisation?"

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very well</td>
<td>26%</td>
</tr>
<tr>
<td>Fairly well</td>
<td>54%</td>
</tr>
<tr>
<td>Fairly poorly</td>
<td>5%</td>
</tr>
<tr>
<td>Don't know</td>
<td>15%</td>
</tr>
</tbody>
</table>

Base: 39

5.48 Communications are broadly carried out well according to 80% of respondents. A small proportion suggest that HEFCW communication with their organisation is carried out fairly poorly (5%).

Electronic and web-based communications

(Q16) "HEFCW has moved increasingly to the use of web-based and electronic communications. How do you view this?"

<table>
<thead>
<tr>
<th>Rating</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very favourably</td>
<td>69%</td>
</tr>
<tr>
<td>Fairly favourably</td>
<td>18%</td>
</tr>
<tr>
<td>No opinion</td>
<td>8%</td>
</tr>
<tr>
<td>Fairly unfavourably</td>
<td>5%</td>
</tr>
</tbody>
</table>

Base: 39

5.49 The move towards the use of electronic communications is well received by the majority of respondents (87%). Two respondents disagree (5%).
Usefulness of Communications

(Q17) "How useful do you personally find the following?"

<table>
<thead>
<tr>
<th>Communication</th>
<th>Very useful</th>
<th>Fairly useful</th>
<th>Not very useful</th>
<th>Not at all useful</th>
<th>Don't know</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>HEFCW website</td>
<td>28%</td>
<td>54%</td>
<td>5%</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HEFCW consultations</td>
<td>10%</td>
<td>54%</td>
<td>5%</td>
<td>21%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>HEFCW Annual Report</td>
<td>21%</td>
<td>41%</td>
<td>10%</td>
<td>21%</td>
<td>8%</td>
<td></td>
</tr>
<tr>
<td>HEFCW circulars</td>
<td>23%</td>
<td>38%</td>
<td>8%</td>
<td>21%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>HEFCW press releases</td>
<td>13%</td>
<td>46%</td>
<td>10%</td>
<td>21%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>HEFCW Corporate Strategy</td>
<td>21%</td>
<td>36%</td>
<td>8%</td>
<td>26%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>HEFCW statistical reports</td>
<td>21%</td>
<td>33%</td>
<td>8%</td>
<td>21%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>HEFCW funding circulars</td>
<td>13%</td>
<td>36%</td>
<td>5%</td>
<td>28%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>HEFCW newsletter</td>
<td>18%</td>
<td>28%</td>
<td>8%</td>
<td>33%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>HEFCW Equality Scheme</td>
<td>23%</td>
<td>21%</td>
<td>38%</td>
<td>38%</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>HEFCW Welsh Language Scheme</td>
<td>13%</td>
<td>18%</td>
<td>18%</td>
<td>38%</td>
<td>21%</td>
<td></td>
</tr>
<tr>
<td>Estates guidance &amp; requirements</td>
<td>13%</td>
<td>51%</td>
<td>28%</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Base: 39

5.50 HEFCW communications are generally considered to be useful with most receiving a combined 'very useful' and 'fairly useful' response from around half or more respondents.

5.51 The most useful communication method is the website (82%). Other useful methods which all received a similar rating are HEFCW consultations (64%), the annual report (62% compared to 41% for institutions), circulars (61%) and press releases (59%).

5.52 The least useful communications are those relating to specific topics which may not be relevant to all partners which is evident from the high proportion of ‘don’t know’ and ‘not applicable’ responses. Communications on estates guidance, the Welsh Language Scheme and the Equality Scheme are considered to be the least useful.
Use of the website

(Q18) "How often do you access HEFCW’s website (www.hefcw.ac.uk)?"

- At least once a week: 5%
- At least once a month: 33%
- A few times a year: 46%
- Never access it: 15%

Base: 39

5.53 The website is much less frequently used by partner respondents and around half visit it a few times a year whilst 15% never access it.

5.54 Around two fifths (38%) access the site once a month or more.
5.55 Further information on HEFCW’s HE sector-facing activities is required for specific topic areas which reflect current changes and developments in the HE sector in Wales and the UK. The main priorities for further information are funding higher education (59%) and reconfiguration/collaboration/sector structure (56%).

5.56 Other topics of interest include governance (36%), fees regulatory role (36%) and quality assurance (28%).
Further feedback on information requirements

5.57 In the follow up interviews, respondents were asked whether there is a need for more information on the four key topics identified as priorities and what knowledge gaps are apparent. The four topics were:

- Funding Higher Education
- Reconfiguration and collaboration/structure of the sector
- Fees regulatory role
- Governance

5.58 In many cases, respondents see no great distinction in the information required in these areas. These are topics which are very current and therefore requests for further information reflect a general desire for more information as things develop rather than specific gaps in knowledge.

5.59 Where partners are located outside of Wales or have UK perspective, information is less prevalent in the press as it tends to focus on England rather than Wales. Direct communication of key issues, changes and implications of issues such as student numbers and fee structure would be helpful.

On Funding higher education

“If you wanted to find out about funding allocation HEFCW’s website is more user friendly than WG. Don't perceive a gap in information. The information is out there should you want it. If you can’t find it – you can pick up the phone and ask.”

“There’s a general requirement for information there’s a hazy view about how whole thing fits together. What is the decision making mechanism for funding – needs to be disseminated down the chain but not 60 pages worth! It’s important that this is communicated more concisely – a block diagram, showing the funding system is worth a thousand pages.”

“I think that the people at the top (Vice Chancellors etc) get the direct communication with HEFCW but then [others] lower down perhaps don’t get the nuances of messages passed on to them. That’s probably why they say they’re missing out on knowledge.”

“Need to know number of funded places and what applicants have to pay - in Wales and Welsh outside of Wales. Clear basic information on website is as good as anything so that staff can find it there. Changes should be communicated - if a big change that affects a particular stakeholder I would expect them to have a telephone call or some other personal contact. It depends on the issue.”
“It’s understandable that people want to know more when there is so much change in all areas. HEFCW’s slightly different role in funding with the new tuition fees. HEFCW is having to get up to speed and it’s still not settled down. It’s a developing system.”

“Compare what’s happening in other countries. What’s affecting Wales and England differently? It is not always affecting Wales when changes happen in England.”

“I would consider reasons for the first three topics to be similar. People can work out funding criteria if they are prepared to spend time analysing the published data. However the big issue is people want to know how priorities are decided and the link between policies and how this translates into funding. Why do we get this funding? Why do we get these student numbers? The why question is particularly true in relation to the re-configuration agenda. What is the logic etc.”

On reconfiguration and collaboration:

“I can absolutely understand this. This has had a destabilising effect. HEFCW have been involved but cannot be as open on this as they might like. A lot of anxiety in the sector.”

“The Minister is very vocal about this and the talking is still going on – it’s work in progress. It’s a big change and the effects are much more directly personal (to individuals)”

“The HE sector is going to look very different and there’s lots of insecurity about that. People need to be able to tell the difference between rumour and fact.”

“There are some good projects and some not so good. It seems a bit vague and inconsistent on what will be funded and what will not. Collaboration is difficult when HEIs are in competition – its different if considering mergers.”

On fees regulatory role:

“It’s in its infancy and nobody really knows how it will work or what the outcomes will be. Potentially HEFCW will have less of a role.”
“Again can understand the anxiety of what might happen in England and Wales. This is a change from the traditional route and there are now regulatory conditions.”

“Income system is different in Wales and England - academics wouldn’t know how to explain it.”

“Can’t really explain what is happening in Wales – it’s not so front of mind. Website or direct communication is best.”

On Governance:

“This is an emerging issue. The Minister is frustrated with current Governance and the funding conduit role of HEFCW and independence of HEIs. The public have a legitimate interest in this area – similarities with banks, health etc.”

“McCormick report was out in the autumn. It’s being reviewed – we will get far more information when bill goes through. It’s all been publicly available. In six months there will be lots of debate over this issue but at the moment people probably want to know more because it’s a current issue that is part way through the process. Nothing more HEFCW can do, really.”

“Governance is a really interesting area and different from the others. It is to do with clarity of HEFCW’s role – it is clear between HEFCW and HEIs but not clear between HEFCW and Minister. e.g. take Cardiff Metropolitan merger proposals. Is the WG prepared to use funding levers to impose their desire and how does this impact on Governance? People do not understand how decisions are made and therefore want to know more.”
Further policy information

(Q20) "Which aspects of HEFCW’s HE policy activities, if any, would you like to know more or less about?"

<table>
<thead>
<tr>
<th>Aspect</th>
<th>More</th>
<th>No change</th>
<th>Less</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Innovation and engagement</td>
<td>49%</td>
<td>49%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Higher education in further education</td>
<td>49%</td>
<td>41%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Research</td>
<td>41%</td>
<td>56%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Skills &amp; employability, including GO Wales</td>
<td>41%</td>
<td>56%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Widening access</td>
<td>38%</td>
<td>51%</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Student engagement and representation</td>
<td>28%</td>
<td>69%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Welsh medium provision</td>
<td>13%</td>
<td>69%</td>
<td>30%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Base: 39

5.60 Around half of the respondents (49%) would like further information on ‘innovation and engagement’ and ‘higher education in further education’. Other topics of interest include research (41%) and ‘skills & employability’ where two fifths would like further information.

5.61 Partners have adequate information on Welsh medium provision where only five respondents (13%) would like further details. Similarly just over a quarter (28%) would like further details on student engagement and representation but over two thirds (69%) need no change in the level of information provided.
Key areas for development

5.62 Respondents were asked to identify any key areas for improvement for HEFCW in the next three years, taking into account their overall service, communications and relationships.

5.63 Not all respondents provided an answer to this question. The responses fall into the following themes:

- Communication
- Future development of the HE Sector

Communication:

“Generally, I have a very positive impression of HEFCW. I think their website and communications could do with a review. In order to make the new reconfigured HE system work effectively, it may be that HEFCW will need to review the data it gathers. HEFCW and the WAG must also avoid the dangers of over-dirigisme, setting broad parameters but not attempting micro-management.”

“Whilst I have regular contact with HEFCE, we have very little parallel contact with HEFCW”

“Making sure we know what is in the pipeline, best guessing government policy to ensure our funding streams”

“Communication and the willingness to share information is very good from HEFCW staff who I have found to be knowledgeable and helpful. I would like to further develop sharing of information with them.”

“Openness and transparency in all matters relating to the Widening Access to HE policies and practices.”

“In terms of key areas for improvement it may be that communications between HEFCW and [our organisation] could be maintained on a more regular basis using video and e-technology. We want to ensure that we have the most up to date intelligence from HEFCW on its priorities for the next three years.”
HE Sector Development:

“How HEFCW relates to the overall UK environment as well as HE’s relationship to the broader educational and industrial communities.”

“Challenge the pace of change of HEIs.”

“A more balanced approach between small ‘niche’ universities and large universities. Both have an important role to fulfil.”

“Sustainable development and energy efficiency.”

“Reconsideration of legitimacy of Funding Council’s role in respect of quality assurance of initial teacher training.”

“Making planning clearer and more understandable.”

“Strategically influencing the future direction of HEIs in building a competitive, innovative and entrepreneurial sector that will significantly contribute to the economic growth and social wellbeing of organisations and people in Wales.”

“Clarification of planning role HE Governance.”
Profile of Respondents

(Q22) "What post do you currently hold in your organisation?"

- Chief Officer / Director / Head of Service: 28%
- Chief Executive: 26%
- Senior Manager/Manager: 18%
- Head of Team: 13%
- Other: 15%

Base: 39

5.64 Respondents to the partner survey hold a variety of roles with just over half being senior decision makers (54%).