

strategic plan
and implementation
framework
2013-2018



contents

Introduction	3
Strategic Plan 2013 - 2018	4
Strategic Priorities	4
Implementing the Plan	5
Measuring and Monitoring	5
Communicating and Reporting	5
Resources	5
Implementation Framework 2013 - 2018	6
Individual Excellence	6
Professional Excellence	7
International Excellence	8
Creating Communities of Practice	9
Ensuring a Sustainable ARMA	11

introduction

ARMA is the UK's professional association for research managers and administrators. We have individual members from over 200 organisations, ranging from universities and funding bodies to the National Health Service and independent research institutions.

Our Mission

3

To enhance the profession of research management and administration, and to facilitate excellence in research through identifying, establishing and exchanging good practice in research management and administration.

We work to deliver our mission by:

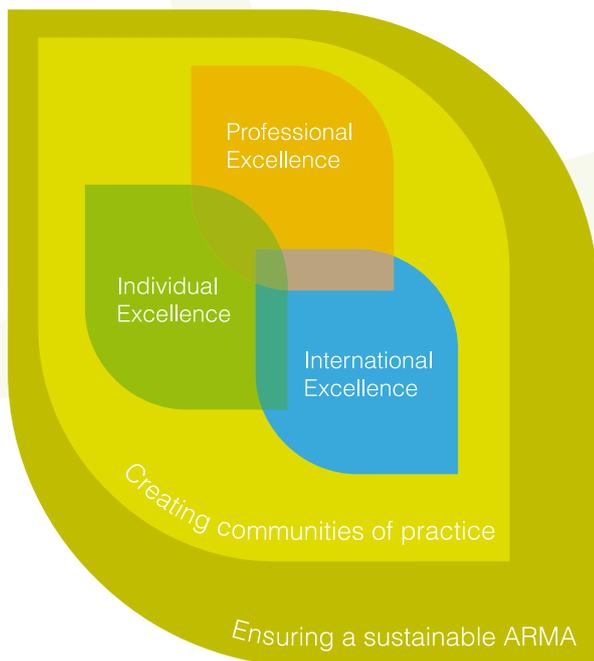
- Delivering training and development events;
- Providing information, advice and support through regular newsletters, communications and guidance materials;
- Facilitating networking for the exchange of best practice and for mutual support amongst members;
- Promoting strategic partnerships within and around the sector;
- Facilitating one-to-one mentoring and providing financial support for individual professional development;
- Representing the collective view of UK research managers and administrators through engagement with government, industry, charities and third sector organisations, and policy makers and influencers; and
- Raising the profile of research management and administration as a profession.

strategic plan 2013-2018

Strategic priorities

This Strategic Plan guides our decision-making and actions on behalf of our members until 2018. It shapes the programmes we deliver, the services we provide and the management of our business and finances. It allows us to set appropriate operational targets, manage the Executive Office and ensure value for money for all. In essence it provides a vehicle for the continued success and the sustainable growth of ARMA and the delivery of our mission.

4



Individual Excellence

We will support the development of excellent research managers and administrators (RMAs) and support our individual members in continuing to develop their skills and expertise. We will ensure that by providing a diverse range of professional tools, resources, events and development opportunities individuals can manage their career effectively.

Professional Excellence

In order to facilitate excellence in research we will continue to promote research management and administration as a recognised and respected profession. We will develop professional standards for RMAs and identify a formalised and accredited pathway for members to develop their skills and expertise. Our aim is for this pathway to be recognised both nationally and internationally.

International Excellence

We will ensure the international dimension of research management and administration is recognised in all of our activity. We will work in partnership with sister organisations and support other international organisations in influencing and driving the professionalisation of research management and administration across the globe.

Creating Communities of Practice

We will provide mechanisms and resources which enable increased dialogue amongst our members and the creation of communities of practice regionally, nationally and internationally. We will create networks for our members in order to share ideas, problems, solutions and best practice in research management and administration. We will diversify the profile of our membership and provide opportunities to link with other networks and raise the profile of research managers and administrators.

Ensuring a Sustainable ARMA

Through transparent and robust governance and business planning, we will ensure the financial and organisational sustainability required to support all of our strategic priorities. Efficient and effective governance and organisational management will ensure our members receive value for money and that we provide opportunity for responsible growth and the enhancement of member benefits.

As we successfully deliver against the aims of this Strategic Plan the reputation of ARMA, our members and our profession will increase. Raising the profile of our activities and maximising our positive impact will result in ARMA being increasingly recognised as a respected voice, both nationally and internationally.

Implementing the Plan

For each of the five Strategic Priorities we have developed an Implementation Framework, identifying our priority actions, our timescales for delivery and our anticipated outcomes.

Measuring and Monitoring

In order to manage and improve our performance, we must measure and monitor our impacts. We will identify key performance indicators relevant to each of our Strategic Priorities and will use a combination of quantitative and qualitative analysis to determine our performance and inform improvements.

Communicating and Reporting

Communication of our Strategic Plan and Priorities for 2013 – 2018 and regular engagement with our members, external stakeholders and partner organisations is critical to our success. We will raise awareness by creating and implementing a robust and comprehensive communications strategy which will clearly identify:

- WHO we engage with;
- WHAT we engage on;
- WHY we are engaging;
- HOW we will engage; and
- WHEN we will engage.

Performance will be approved and monitored by the Board of Directors and reported to the membership and our stakeholders through publication and dissemination of our Annual Report and our annual submission to Companies House.

Resources

We will allocate the appropriate level of resources required to ensure delivery of our Strategic Plan. This includes financial investment but also will include the management of staff and Board time, staff training and development and the application of appropriate organisational management and governance processes and procedures.

implementation framework 2013-2018

Individual Excellence

We will support the development of excellent research managers and administrators (RMAs) and support our individual members in continuing to develop their skills and expertise. We will ensure that by providing a diverse range of professional tools, resources, events and development opportunities individuals can manage their career effectively.

Priority Areas for Action

1. Develop innovative, diverse and professional resources

We will consult with our members to develop resources that enable their continual professional development. We will improve existing member services and maximise opportunities to develop new offerings that reflect emerging trends in research management and administration and support members' career development.

Deliverables

- I. We will review and revise the Training & Development Programme delivery mechanisms, including the use of new media and online resources.
- II. We will invest additional resources in the Joan Hughes Bursary Scheme, providing greater opportunity for members to apply and benefit.
- III. Will develop a process whereby learning outcomes from all membership services are disseminated across our networks and used to inform the development of new services and content of ARMA events, thus creating a virtuous learning circle.
- IV. We will invest in the development, expansion and maintenance of the online Resource Library and will regularly review content and functionality of the ARMA website and the Member Management System, ensuring it remains appropriate and useful for members.
- V. We will continue to deliver and improve our 'core services', including provision of the Training & Development Programme, the Annual Conference, Study Tours and the Bursary and Mentoring Schemes.

2. Ensure mechanisms exist for supporting and recognising individual excellence

We will develop a route to formal professional recognition for individual research managers and administrators. We will work with the appropriate awarding bodies to develop professional qualifications that are based on relevant knowledge, skills and experience. Intrinsically linked to the ARMA Professional Development Framework, introduction of the qualifications will reflect the professionalisation of research management and administration and the increasing stature of managers and administrators in their organisations.

Deliverables

- I. We will work with the Institute of Administrative Management to develop QCF Levels 3, 5 and 7 RMA qualifications that are fully aligned to the ARMA Professional Development Framework.

3. Support RMAs to plan and manage their career progression

We will continue to regularly review and develop the ARMA Professional Development Framework, providing members with a resource for identifying their development needs and informing their career progression. We will facilitate networking, mentoring and other opportunities for members to directly share experience and best practice.

Deliverables

- I. We will expand the Mentoring Scheme, providing greater opportunity for short, long and fixed-term professional coaching for members.
- II. We will ensure the Training & Development and Annual Conference Programmes are fully integrated and aligned with the Professional Development Framework.

Professional Excellence

In order to facilitate excellence in research we will continue to promote research management and administration as a recognised and respected profession. We will develop professional standards for RMAs and identify a formalised and accredited pathway for members to develop their skills and expertise. Our aim is for this pathway to be recognised both nationally and internationally.

Priority Areas for Action

4. Ensure professional standards are recognised, understood and valued by research managers and administrators and that research management and administration is recognised and respected as a worthwhile career

We will create and implement strategies designed to promote the value of the ARMA professional qualifications amongst our members and to give them confidence that their careers will be enriched by pursuing professional recognition. We will add value to membership by designing and delivering services that enhance members' knowledge and skills and facilitate career progression. We will seek to give members confidence that their professional experience, knowledge and skills are recognised and valued by their employers and other stakeholders.

Deliverables

- I. We will implement communication and marketing processes that facilitate engagement with media partners to promote ARMA and our members' credentials.
- II. We will implement and Partnership & Collaboration Strategy, identifying ways to engage with sector professional groups, international sister organisations, employer associations and funding bodies.
- III. We will provide trainer certification for all ARMA event leaders and facilitators.
- IV. We will ensure the Training & Development and Annual Conference Programmes are aligned to the professional standards of the ARMA qualifications.
- V. We will ensure outputs from membership services are aligned to the professional standards of the ARMA qualifications.

5. Ensure members of other professions recognise and value our professional standards and that research management and administration is recognised and respected as a professional career, both nationally and internationally

We will create and implement strategies designed to promote the value of research management and administration, the ARMA professional qualifications and the credentials of our members amongst key stakeholders, including employers, funding bodies and other sector representative groups. We will seek to actively promote UK research management and administration alongside the credentials of ARMA members.

Deliverables

- I. We will actively seek to contribute to the development of stakeholders' strategic activities, ensuring the role of RMAs is recognised in those professions and organisations.
- II. We will recruit high-profile national and international speakers to contribute to ARMA events.



International Excellence

We will ensure the international dimension of research management and administration is recognised in all of our activity. We will work in partnership with sister organisations and support other international organisations in influencing and driving the professionalisation of research management and administration across the globe.

Priority Areas for Action

6. *Work with other organisations to support RMAs internationally*

We will agree memoranda of understanding with our international sister organisations that establish frameworks for collaboration and the sharing of resources. We will work in partnership to develop mutually beneficial opportunities for our members.

Deliverables

- I. We will work with the Institute of Administrative Management to align ARMA qualifications with the European Qualifications Framework.
- II. We will promote knowledge exchange with our sister organisations by sharing member-only online resources with our respective memberships.
- III. We will align ARMA professional standards and qualifications with the professional recognition pathways of our sister organisations.
- IV. We will share our operational best practice with international groups to support the growth of new sister organisations.

7. *Promote an internationally relevant and recognised Professional Development Framework*

We will regularly review the ARMA Professional Development Framework (PDF) to ensure its relevance to international research managers and administrators as well as those based in the UK. We will encourage other organisations to adopt use of the PDF by developing a suite of member products and services that reflect and support an internationally relevant and recognised PDF.

Deliverables

- I. We will launch international Special Interest Groups.
- II. We will use new media and online resources to deliver virtual international Training & Development events.
- III. We will develop an international mentoring scheme.
- IV. We will work with national and international partner organisations to establish an ARMA secondment scheme.
- V. We will attend and present at international conferences, representing ARMA and promoting the Professional Development Framework and ARMA professional qualifications.
- VI. We will work with international partners to identify and develop projects that assist the adoption of the Professional Development Framework internationally.



8. Develop services for non-UK members

To support our growing international membership we will create a suite of services, the benefits of which will reflect the specific requirements of international research managers and administrators.

Deliverables

- I. We will announce details of our services for non-UK members at INORMS 2014 in Washington DC.
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9. Develop and host a suite of international events

We will continue to actively contribute to the activities of the International Network of Research Management Societies (INORMS) and in partnership we will develop and host a suite of events aimed at international audiences or combined audiences of international and UK delegates. We will design sessions for the ARMA Annual Conference targeted at international delegates.

Deliverables

- I. We will incorporate international themes into the Training & Development Programme.
 - II. We will contribute to the development and delivery of the INORMS 2014, 2016 and 2018 programmes.
 - III. We will incorporate international themes into the Annual Conference Programme.
 - IV. We will facilitate international Study Tours.
 - V. We will seek to host joint events with our sister organisations.
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Creating Communities of Practice

We will provide mechanisms and resources which enable increased dialogue amongst our members and the creation of communities of practice regionally, nationally and internationally. We will create networks for our members in order to share ideas, problems, solutions and best practice in research management and administration. We will diversify the profile of our membership and provide opportunities to link with other networks and raise the profile of research managers and administrators.

Priority Areas for Action

10. Develop mechanisms and resources to create communities of practice

We will facilitate opportunities for members to network, share ideas, problems and solutions and share and create best practice in research management and administration. We will facilitate face-to-face networking as well as virtual interactions.

Deliverables

- I. We will invest in the development of the online Special Interest Groups, promoting discussions, championing content and growing and diversifying their membership.
- II. We will provide greater opportunities for networking and fringe meetings at the Annual Conference.
- III. We will host regular regional networking events.
- IV. We will review and revise Training & Development delivery models to include residential training events.
- V. We will continue to promote the use of peer support groups.

11. Increase the number of ARMA members

We will develop and deliver membership recruitment and retention strategies that ensure our Association, its networks and communities of practice continue to grow. Our membership services will be designed to enhance the member experience, reflecting best practice in research management and administration and demonstrating value for money for new and existing members.

Deliverables

- I. We will capitalise on the findings of our market research and implement a recruitment campaign across the UK higher education sector.
- II. We will develop existing and new services that are relevant to current members, ensuring content is appropriate for retaining and growing our membership.
- III. We will respond to the transient nature of event-led membership, acknowledging the value of turnover amongst the membership but develop existing and new services that lead to increased levels of membership renewals amongst this group.

12. Foster greater diversity in our membership

Diversifying the profile of our membership and exposing members to the skills and experiences of colleagues from other backgrounds will add value to the membership experience. We will therefore foster links with other networks and sector groups and seek to promote ARMA membership amongst colleagues from other backgrounds.

Deliverables

- I. We will work with funding bodies, government agencies and industry to identify target areas for membership growth and to implement an appropriate recruitment strategy.
- II. We will work with the NHS and third sector bodies to identify target areas for membership growth and to implement an appropriate recruitment strategy.

13. Develop links with other networks to share resources and best practice

We will practice resource efficiency, maximising members' exposure to the unique resources and best practice offered by partner networks and groups. We will steward relationships and foster partnerships with other organisations with the intention of securing reciprocal agreements for the sharing of relevant resources.

Deliverables

- I. We will develop and implement a Partnership & Collaboration Strategy, identifying ways to engage with sector professional groups, international sister organisations, employer associations and funding body representatives.
- II. We will further develop relationships with higher education groups, funding bodies, government, industry groups, NHS groups and third sector bodies.



Ensuring a Sustainable ARMA

Through transparent and robust governance and business planning, we will ensure the financial and organisational sustainability required to support all of our strategic priorities. Efficient and effective governance and organisational management will ensure our members receive value for money and that we provide opportunity for responsible growth and the enhancement of member benefits.

Priority Areas for Action

14. Develop and implement operational strategy and enabling policy that will ensure financial and organisational sustainability

Efficient and effective organisational management will ensure our members receive value for money and that we provide opportunity for responsible growth and the enhancement of member benefits. We will therefore devise strategies with corresponding policies and action plans that facilitate best practice in business planning and operational management. This includes but is not limited to:

14a. Membership Recruitment and Retention

Our members are the lifeblood of our Association and without them our mission is meaningless. To ensure we remain relevant to research managers and administrators, we will develop resources that reflect the varying depth of experience across the sector as well as the breadth of activity in which RMAs engage, i.e. we will develop services that enable us to recruit new members but also retain existing members. To ensure our relevance, we will deliver services that reflect the broad range of seniority and longevity of experience of our members, thus ensuring junior members of staff and Directors of Research alike benefit from ARMA membership.

Deliverables

- I. We will implement communication and marketing processes that facilitate engagement with existing and emerging markets.
- II. We will capitalise on the findings of our market research and implement a recruitment campaign across the UK higher education sector.
- III. We will regularly engage with our members on topic-specific subjects and through a variety of channels to inform development of services.
- IV. We will secure an annual 4% increase in members.

14b. Partnership & Collaboration

Reaffirming existing partnerships, stewarding new relationships, widening the ARMA network and broadening our scope of influence will contribute to our overall sustainability. A meaningful network of stakeholders and a policy for regular engagement and consultation will ensure ARMA remains an innovative, credible professional body, responding to stakeholder views and activities but also informing and influencing the development of best practice in research management and administration. We will create and implement a Partnership & Collaboration Strategy, allowing us to nurture relationships that will ultimately benefit our members, either through resultant products and services or through the extended reach of ARMA's influence over policy makers.

Deliverables

- I. We will develop and implement a Partnership & Collaboration Strategy, identifying ways to engage with sector professional groups, international sister organisations, employer associations and funding bodies.

14c. Financial Management

Securing financial sustainability is critical to our long-term success. We will continually monitor and review our financial management processes to ensure we remain solvent. We will diversify our income to promote financial security and as a not-for-profit organisation, we will reinvest cash surpluses into the development and delivery of new and enhanced member services. Our financial planning and management will be transparent and ethical and will balance an appropriate level of risk with considerations for affordability and relevance. In terms of our interaction with commercial sponsors and partners, we will give due consideration to financial and business objectives but will always consider the wider benefit and relevance to our membership and will always address legislative and regulatory concerns and consider our social responsibilities as a company limited by guarantee.

Deliverables

- I. We will launch bespoke ARMA Consultancy Services.
- II. We will introduce and maintain a 3-year budget management cycle.
- III. We will create and implement a Commercial Sponsorship Strategy.
- IV. We target annual event cost efficiency savings of 1.5%.
- V. We will maintain quarterly and annual reporting processes.

14d. Event Management

We will continue to develop and deliver our annual Training & Development (T&D) Programme as a core component of our business plan. We will ensure the Programme is compliant with the principles of ISO20121, implementing an event management system that allows us to realise operational efficiencies and embed sustainability throughout the entire management cycle, including leadership, planning, communications, supply chain management and performance monitoring. We will use the event management system to enhance delegates' experience of ARMA events, improve our financial performance and reduce our environmental impacts.

Deliverables

- I. We will regularly review the Training & Development Programme full economic costing model.
- II. We will regularly review the Annual Conference pricing structure.
- III. We will deliver an annual 5% increase of event delegate numbers.

14e. Risk Management

Maximising our impact whilst managing risk is crucial to ensuring our long-term sustainability. Our approach to risk will be appropriately balanced with our approach to opportunity, i.e. we will evaluate the member, financial and business benefits of any opportunity against the economic, social and environmental impacts of a potential decision to ensure we realise organisational objectives without a detrimental effect on external bodies or environments.

Deliverables

- I. We will establish and monitor an ARMA Risk Register.

14f. Communications and Marketing

Effective communication and the promotion of ARMA, our services and our members are critical for our long-term success. We will develop and deliver communications and marketing strategies designed to maximise members' exposure to ARMA's services and to also increase external awareness of our Association. We will devise strategies that allow us to promote the Association across a wider audience of potential members and stakeholders, growing our membership, extending our influence and opening up prospective markets.

Deliverables

- I. We will implement communication and marketing processes that maximise members' exposure to ARMA's services and increase external awareness of our Association.
- II. We will invest in the design, publication and dissemination of ARMA marketing materials.

14g. Human Resources / Health & Safety / Equality & Diversity / Data Protection

As a responsible employer, we will regularly monitor and review our Human Resources, Health & Safety and Equality & Diversity policies to guarantee legal compliance but to also ensure we manage a professional, safe and welcoming environment for our staff and for our event delegates. Ensuring the health and well-being of the Executive Office equates to the long-term health and well-being of the Association. We will monitor the welfare of all staff and ensure they benefit from a flexible, secure and supportive team environment and a good work-life balance. We will ensure staff are equipped with the knowledge and skills required to be successful in their roles, providing development opportunities when necessary. Staff will be recognised and rewarded appropriately for their efforts.

Deliverables

- I. We will create and implement a Human Resources Policy.
- II. We will monitor implementation of Health & Safety Policy.
- III. We will create and implement an Equality & Diversity Policy.
- IV. We will review and revise our Data Protection Policy.
- V. We will manage annual staff performance and appraisal.



14h. Environmental & Social Responsibility

We will address our impacts in relation to the environment through energy reduction, sustainable travel, waste recycling, water preservation, responsible procurement and carbon management. Doing so will not only address environmental concerns but will also help us reduce our outgoings and realise cost savings. In order to understand the impact of our current practices and processes, we will use the CarbonLive™ environmental management system to monitor and control the impacts of our day-to-day office management. In addition, we will use the Delivering Positive Impact™ sustainable low carbon conference and events management system to establish the environmental impact of our programme. We will then put in place appropriate measures to minimise our environmental impacts, reduce our financial costs and enhance our overall member experience of our annual events programme.

We will collaborate with sector and non-sector organisations to promote sustainable development and when possible we will address our social responsibility through local community engagement initiatives. Through our annual events programme, we will identify a charitable or community partner and promote their activities to delegates, seeking support and encouraging engagement. As part of our annual conference, we will work with a local and/or university partner to identify and support a suitable community project.

Deliverables

- I. We will introduce environmental reporting as part of the company's quarterly and annual reporting.
- II We will achieve ISO20121 certification (sustainable events).
- III. We will achieve ISO26000 compliance (social responsibility).
- IV. We will exhibit leadership in carbon management.

14i. Responsible Procurement

Purchase decisions are made every day in the course of our business management and the right choices need to be made to manage the impacts of those decisions. We will create a Procurement Policy that guarantees value for money and through effective supply chain management we will engage with all our suppliers to ensure they are aware of our requirements for sourcing sustainable venues, materials and supplies. Venue providers, suppliers, specialist consultants, speakers, event leaders and anybody who directly or indirectly procures on behalf of ARMA will be made aware of our policy and encouraged to consider the impacts of their procurement and to take steps in making more economical, ethical and sustainable choices.

Deliverables

- I. We will develop and implement an ARMA Procurement Policy, integrating policy with ARMA's Financial Regulations.

14j. Monitoring & Evaluation

Continual appraisal and evaluation of our performance is critical for ensuring future success. Understanding our performance will allow us to manage and maximise the benefits of membership. We will use the results of our evaluation to inform on going staff and business development, ensuring we realise our business objectives and our ambitions to be a sustainable organisation.

Deliverables

- I. We will create and implement an Organisation Evaluation Strategy.
- II. We will regularly engage with our membership on topic-specific subjects and through a variety of channels to inform development of services.

15

15. Manage a considered approach to the diversification of ARMA activity, developing opportunities that enhance the member experience whilst broadening the organisation's scope of income and financial security

We will consult with members to inform business development, exploring opportunities to improve existing and create new member services. We will work in partnership with sector bodies, commercial entities and national and international organisations to develop and deliver a sustainable business strategy. We will work to ensure financial security and to build reserves that will be continually reinvested into the Association's support and services.

Deliverables

- I. We will capitalise on the findings of our market research and implement a recruitment campaign across the UK higher education sector.
- II. We will undertake a biennial market research exercise.
- III. We will regularly engage with our membership on topic-specific subjects and through a variety of channels to inform development of services.

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