

## **Student Finance England**

### **HEI Services and Finance Stakeholder Group**

#### **Terms of Reference**

##### **Background**

From February 2009 the Student Finance England Service has been operational. This new phase of development of the service has signalled the need for the SLC to review its structure and approach to Stakeholder Engagement.

Engagement to date has been focussed on gaining stakeholder input to the design of the new Student Finance Service as it has been developed and ensuring the service works for stakeholders as well as customers.

However, engagement with stakeholders now requires to change its focus to look at operational aspects of the service and its delivery, as well as continuing to advise on changes and improvements to the service. This need has been highlighted by both stakeholder feedback and the Hopkin Review of Student Finance delivery.

The Student Loans Company acknowledges that its reputation with customers and stakeholders has been damaged by the delivery issues in 2009 and that closer working relationships with key stakeholders is central to improving the service going forward.

##### **Review of Stakeholder Engagement**

In order to ensure the most effective structure for this engagement the existing structure of panels and stakeholder meetings has been reviewed and a new structure of Stakeholder Groups has been developed in order that SLC is supported and advised by stakeholders in the delivery of the Student Finance England Service.

Of central importance to this new structure of engagement is the establishment of a high level strategic Forum. Led by a HE Sector Chair and with a remit to engage directly with the SLC Board this Stakeholder Forum will guide and challenge SLC in its delivery of the Student Finance England Service.

Below the Forum a number of working groups will review and discuss operational aspects and feed into the Forum which will provide a route for escalation of issues to the SLC Board.

##### **New Stakeholder Engagement Structure**

The structure involves 6 Stakeholder Engagement groups:

1. **The Student Finance England Stakeholder Forum** – A strategic Forum to enable the HE sector to engage with SLC, its Board and BIS to provide advice, challenge and look at risks and issues affecting the delivery of SFE.
2. **The Student Finance Operations Stakeholder Group** – To focus on dealing with issues related to the operation of the entire annual application cycle.
3. **The IAG and Customer Insight Stakeholder Group** – To provide input to IAG strategic processes, messages and campaigns.
4. **The Disabled Student Stakeholder Group** – To monitor the operational delivery of specialist support to disabled students
5. **Vulnerable Student Stakeholder Group** - To monitor the operational delivery of specialist support to vulnerable students
6. **The HEI Services and Finance Stakeholder Group** – To focus on the processes and procedures governing interactions between SLC and HEIs to support the application cycle and delivery of the service

### **Purpose of the HE Services and Finance Stakeholder Group**

The purpose of the group is to:

- Review and input to the development and improvement of processes and procedures governing interactions between SLC and HEIs.
- Review the service 'readiness' at an early stage in the annual cycle in terms of information being updated on courses, bursary rules and other annual data
- Review financial transfers of fees and the triggers involved in enabling this to happen each year including the attendance confirmation process and change of circumstances processes.
- Review communication plans to HEIs including activity of HEI Relationship Managers, annual conferences and regional events
- Review all changes and improvements to 'HE services' i.e. the services provided by SLC to HEIs, to gain the expert advice and input of HEIs to the design of planned changes and improvements.

### **Undertakings of the Group**

#### SLC's Undertakings

In support of the aims outlined above the SLC will engage with the Group to:

- Provide up to date information on the level of completeness of HEI information within the system including courses, bursary rules and other annual data and discuss how HEIs can support SLC to achieve a higher level of data completion
- Update the group with information related to fee payments and the triggers involved in enabling fees to be paid
- Bring to the Group information on the functionality of the attendance confirmation process and change of circumstance to discuss the performance of these processes and agree any future changes
- Present to the group the communication plans to discuss and agree the content and timing of seminars and conferences for HEI practitioners
- Review with the Group the performance of 'HE Services' to gain their suggestions and input to any future changes.
- Review design proposals of new components of the service at an early stage in order that the Group can input to the early design of service changes and improvements

### Members' Undertakings

In support of the aims outlined above the stakeholder members of the Group will contribute to the meetings in order to:

- Provide constructive challenge to the management information provided
- Provide feedback and ideas from an HEI perspective regarding how and blockages can be removed and issues resolved to achieve the smooth working of the interactions between HEIs and SLC
- From their organisations' role in student finance highlight issues that may be impacting on students
- Make recommendations to the SLC as to how issues could be addressed and improvements could be made
- Support SLC by undertaking actions that may support the smooth delivery of the service
- Provide insights and expertise to input to the design of future changes and improvements
- Validate the design of new components of the service

### **Scope**

- The group will deal only with matters related to the Student Finance England Service. It will consider service matters related to prospective and current students, including the payment of grants, loans and fees. The service for the repayment of loans is out of scope.
- The group will consider matters related to courses database, tuition fees, attendance and fee reporting and financial reconciliation. It will focus on these areas, recognising they are key dependencies of the SFE service, and given that the SFE Operations stakeholder group considers the SFE service from a student/sponsor perspective.
- With the focus being on these SLC/HEI interactions, the membership includes representation from across the UK.
- There is a sector-lead HEBSS Steering group, reflecting the nature of SLC/HEI relationship and the basis of the HEBSS service which is not within the scope of the SFE service. The HEI/Finance group will consider the interdependencies between SFE and HEBSS

### **Membership**

It is proposed that members of the Group will be drawn from the following organisations:

BUFDG – chair

ARC, AHUA, AMOSSHE, NAMSS

UUK, Guild HE, AoC

OFFA, UCAS, OU

Co-opted representatives from Welsh and Scottish HEIs

BIS Observer/Advisor

SLC

Reasonable member expenses will be met by the SLC where required, in line with SLC Travel Policy.

### **Agenda**

Meeting agendas will be agreed through dialog between the Stakeholder Chair and the SLC. Agendas will be agreed through consideration of:

- Matters which stakeholders regard as being of importance and/or urgent to consider due to experience and intelligence 'on the ground'
- Matters related to service delivery and developments that the SLC identifies as being beneficial to share and discuss with the group

### **Ways of Working**

Members of the HEIs/Finance Stakeholder Group will commit to working in the following ways:

- Dialogue will be open and constructive with both parties prepared to listen and be open-minded regarding information shared with the objective of getting a better service for the customer
- The relationship must show mutual respect and trust, with sensitive information being treated as such and confidentiality respected
- The extent of onward communication of sensitive information will be agreed as such items arise
- The group will work together to tackle difficult issues or risks, seeking to find solutions and the best way forward
- Communication from the group to the wider sector will be agreed at the end of each meeting, papers or presentations taken to the Group will not be communicated more widely outside the Group unless agreed by the SLC/Chair.

### **Format and Frequency**

- Meetings will be held three times a year.
- A schedule will be determined for the application year which identifies key consultation and information sharing points within the service cycle for meetings to take place.
- The location of meetings may vary in line with member agreement.
- Administrative support will be provided by SLC including issuing papers and minutes of meetings and maintaining a formal record of issues and actions.