

**RE-P-2020-03-Annex B**

# Edge Hill University

## HEIF accountability statement

**Narrative return template for HEIF funding period  
2021-22 to 2024-25**

**Return date: 21 May 2021**

Return as Microsoft Word file to: [KEPolicy@re.ukri.org](mailto:KEPolicy@re.ukri.org)

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## **Question 1 – Strategic objectives**

**Summarise the institutional strategic objectives that relate to knowledge exchange and guide your plans for HEIF.**

We expect institutions' plans for HEIF to be guided by strategic objectives for knowledge exchange. However, there is no requirement for institutions to submit or maintain a standalone knowledge exchange strategy document.

We appreciate that KE objectives may be found in a specific KE strategy document or they may be contained as part of other strategic documents such as teaching, research or overarching institutional strategies.

Whatever form your knowledge exchange objectives are in, please provide a precis of the main objectives here so that we can see the strategic context that guides your plans for HEIF and forms the basis for your monitoring and delivery of intended benefits.

We welcome the inclusion of hyperlinks to published strategies and plans that may be referenced in the summary.

*In answer to this question, you are free to use text or tabular format but please ensure that the question response is contained in no more than two pages of A4.*

Edge Hill University's strategic objectives for knowledge exchange (KE) in the period to 2024-25 have been identified through a process in which we have drawn on assessments of:

- Our own performance in KE across the University, looking at what has worked well and what has worked less well
- Our broad, evolving disciplinary mix. Long-term strengths in the social sciences, arts and humanities, education and healthcare continue to develop alongside expansion in STEMM (computer science, medicine, bioscience (including biomedical) and engineering
- Key University strategy documents, including the Strategic Plan 2021-25, our post REF2021 research strategy (*Lifting Off*), and the Learning and Teaching Strategy.
- The external policy environment, as set out in a key documents including the Industrial Strategy, UKRI's UK Research and Development Roadmap.
- The needs of our local area, as set out in local strategic plans for economic development, regeneration, education and training.

This exercise has demonstrated that the strategic approach set out in our previous five-year institutional KE strategy for using HEIF has been successful. In that time we have:

- established and expanded a professional KE and business development unit
- developed a student-centred model of KE, providing opportunities for students to assist in projects and gain employability and enterprise skills
- secured and delivered a core of ESIF-funded projects to tackle the productivity, innovation and leadership challenges within our local economy
- embedded ourselves into the economic development, regeneration and innovation landscape within the local area
- developed and shaped strategic relationships with local and regional partners in key opportunity sectors. For example, our Institute for Creative Enterprise is an established partner in creative and cultural industries development in the Liverpool City Region and is now assisting in the delivery of interventions
- developed and refined a model of engagement with external partners (companies, schools, healthcare providers) which creates opportunities for a wide range of collaborations, from student projects, collaborative and contract research and consultancy through to major local economic development initiatives.
- formed and delivered through external partnerships with local and regional organisations, including Tate Liverpool, Everton in the Community.

We have also identified a number of areas in which we have been less successful. A number of KE *cold spots* remain in which activity levels are too low, the knowledge exchange offer is not sufficiently well-articulated and not as well supported. Nevertheless, this process of reflection on the last five years has shown that we have an approach that can be built on and extended across the University.

Table 1 summarises University and external strategies that have shaped our objectives.

| <b>Internal strategic policy influences</b>  |   |
|--|---|
| Edge Hill University Strategic Plan  | As part of our drive to enhance teaching and learning and the student experience the Strategic Plan includes a commitment to student employability and enterprise for students to develop transferable skills.  |
| Edge Hill University Research Strategy   | Our research strategy includes commitments to develop strategic, cross-sectoral partnerships for knowledge co-creation through the development of ten new research centres, including those that address the IRIS themes of the Industrial Strategy.  |
| Edge Hill University teaching and learning strategy  | Edge Hill is committed to excellence in teaching and learning. The curriculum is underpinned by pedagogy, research and knowledge exchange. There is a specific aim to create 'A dynamic academic community that nurtures excellence in learning, research and the application of knowledge, enterprise and entrepreneurship, regard for sustainability and civic responsibility.' |
| <b>External strategic policy influences</b>  |   |
| UKRI UK Research and Development Roadmap   | Levelling up and Place<br>Research partnerships and collaborative research<br>Impact<br>Key industries, technologies and ideas  |
| Industrial Strategy  | Ideas – the development of new research centres aimed at Grand Challenges, IRIS themes and other strategic priorities.<br>People – equipping people for well-paid employment and enterprise across the UK<br>Place -embedding into economic development and regeneration systems and becoming a major delivery partner in the Liverpool and Lancashire city region areas.         |
| Local city-regional priorities   | Supporting innovation, productivity and business leadership; growing key sectors (inc. creative and digital sectors).   |
| <b>Table 1: Shaping our strategic objectives for knowledge exchange: internal and external strategic policy influences</b> |   |

Our strategic objectives for knowledge exchange are as follows:

- 1) To build a strong and highly active portfolio of external partnerships, exchanging knowledge through a range of staff-led and student-centred projects.
- 2) To enhance student experience and student and graduate employability and earnings through the expansion of student/graduate-centred knowledge exchange projects
- 3) To become a key delivery partner in local economic development and regeneration activity in the Lancashire and Liverpool City Region areas, helping to tackle both longstanding socio-economic challenges and contributing to recovery from the impact of Covid-19
- 4) To align our knowledge creation and exchange activities to address the Industrial Strategy *Grand Challenge* areas and other challenges identified in local and regional policy, driven by the expansion of our research centres.
- 5) To contribute to public life by sharing the benefits of higher education and research through the delivery of high quality public engagement activities.

## Question 2 – Use of HEIF

### How do you intend to use your 2021-22 to 24-25 HEIF allocations?

As detailed in [RE-CL-2020-04](#) and RE-P-2020-03., in order to enable institutions to effectively respond to the Covid-19 pandemic, we will use the 2019-20 HEIF Annual Monitoring Statement submitted in February 2021 to gather information about the use of HEIF during 2020-21,

In this accountability statement return we would like to know about your plans for HEIF for the remainder of the funding period 2021-22 to 2024-25. Please include indication of the planned timescale of the activity e.g. 2021-22 only; ongoing or 2022-23 onwards.

Please use the response layout grid provided overleaf, to provide the following information:

- a) Describe the key activities supported by your HEIF allocation.
- b) Include specific reference to how you expect HEIF to support these activities – i.e. specific expenditures: funded posts, academic staff buy out, internal competitive projects; and the proportion of the activity that is supported by HEIF (e.g. x1 business development post 50% HEIF funded).
- c) How these activities relate to the government priorities and RE-OfS strategic objectives outlined in paragraphs 9 and 10 of RE-P-2020-03. Where student benefits are achieved, please include an indication of the number of students benefiting.
- d) Which strategic KE objective, as outlined in question 1, does each activity relate to.
- e) Indication of the timescale for each activity (e.g. 2021-22 only, ongoing or to be confirmed)

*In answer to this question, please use the response grid provided and ensure that the entire question response is contained in no more than six pages of A4 or A3.*

**Question 2: Use of HEIF**

(Max 6 pages of A4 or A3)

| <p><b>Planned areas of HEIF supported KE activity</b></p> <p>Please provide an overview of planned KE activities or projects that will be supported by your 2021-22 and onwards HEIF allocations.</p> | <p><b>HEIF support</b></p> <p>How HEIF will be used to support the project?</p>                     | <p><b>HEIF priorities</b></p> <p>How does this relate to govt priorities and RE-OfS strategic objectives? (Including note of scale where student benefits are achieved.)</p>      | <p><b>Strategic objectives</b></p> <p>Which institutional strategic KE objective does this relate to?</p>  | <p><b>Indication of timescales</b></p>   |
|---|---|---|--|--|
| <p>Productivity &amp; Innovation Centre – Lancashire</p> <p>Productivity &amp; Innovation Centre – Liverpool City Region</p> <p>Upskilling Lancashire</p> <p>Leading Lancashire</p>                   | <p>ESIF funded projects with an intervention (grant) rate of c.60%, HEIF used as match-funding.</p> | <p>Support for People and Place pillars of the Industrial Strategy through geographically and sectorally targeted action on business productivity, innovation and leadership.</p> | <p>Objective 3: To become a key delivery partner in local economic development and regeneration activity in the Lancashire and Liverpool City Region areas, helping to tackle both longstanding socio-economic challenges and contributing to recovery from the impact of Covid-19</p> | <p>Projects ongoing, expected to run, be expanded or replicated across the period to 2024/25</p> |
| <p>Public Engagement programme, including annual Festival of Ideas</p>  | <p>Part-funding co-ordinator costs</p>  | <p>Promoting an open and outward looking research and knowledge exchange culture.</p>   | <p>Objective 5: To contribute to public life by sharing the benefits of higher education and research through the delivery of high quality public engagement activities.</p>   | <p>Annual, ongoing</p>   |

|  |  |  |   |                |
|--|--|--|---|----------------|
| <p>Deliver flagship student-led KE projects e.g. Tackling the Blues</p>            | <p>Part funding the development and delivery of new student-centred KE projects.</p> | <p>Supports People and Place pillars of the Industrial Strategy, creating opportunities for students to gain employability, enterprise and workforce skills.</p> | <p>Objective 2: To enhance student experience and student and graduate employability and earnings through the expansion of student/graduate-centred knowledge exchange projects</p> <p>Objective 2: To enhance student experience and student and graduate employability and earnings through the expansion of student/graduate-centred knowledge exchange projects</p> | <p>Ongoing</p> |
| <p>Strategic initiative to extend student-centred KE across the university</p>     |  |  |   |                |
| <p>Strategic partnership development, aligned to expansion of research centres</p> | <p>Part-funding an increase in research development capacity</p>                     | <p>Supports Ideas pillar of the Industrial Strategy by bringing forward collaborative projects with private, public and third sector partners.</p>               | <p>Objective 1: To build a strong and highly active portfolio of external partnerships, exchanging knowledge through a range of staff-led and student-centred projects.</p>   | <p>Ongoing</p> |

### Question 3 – Monitoring success

How do you manage your HEIF funding and monitor the success of your activities against the strategic objectives set out in question 1, and in line with delivering Government priorities?

Describe the policies, procedures and approach you have in place in the context of your strategic objectives to:

- i. manage your HEIF spending
- ii. measure progress
- iii. evaluate outcomes and
- iv. identify lessons learned.

*In answer to this question, you are free to use text or tabular format but please ensure that the entire question response is contained in no more than four pages of A4.*

*(Max 4 pages of A4)*

HEIF spending is overseen by the HEIF and Knowledge Exchange Steering Group, which reports to the University Research & Innovation Committee. The Steering Group, which includes PVC (External), associate deans for enterprise, innovation and knowledge exchange from each of the three faculties of the university, and other stakeholders, meets three times per annum in order to guide and oversee:

- setting of KE strategy
- HEIF expenditure
- Progress towards strategic objectives
- Good practice in knowledge exchange.

Our allocation of HEIF funding internally is generally stable, with funding used to support key teams, posts and a number of larger projects requiring match-funding. Our ESIF funded projects (funded at intervention rates of circa 60% and therefore requiring match-funding) are overseen by a separate ESIF Steering Group, which reports to the HEIF Steering Group which tracks:

- Expenditure
- Outputs and outcomes
- Reporting



The ESIF Steering Group also makes decisions on when and how to pursue new projects, or extensions to existing projects.

The HEIF and Knowledge Exchange Steering Group measures progress towards our strategic objectives through a process of standardised faculty activity reporting. Faculty staff with lead responsibility for knowledge exchange report three times per annum on:

- Strategic developments
- Emerging Opportunities
- Major income-bearing projects
  - under development
  - underway
- Major non income-bearing projects
  - under development
  - underway
- Success stories
- Opportunities for cross-faculty collaboration
- Capacity-building activity
- Developments in knowledge exchange support

The HEIF and Knowledge Steering Group also reviews and uses data collected for and submitted to HE-BCI survey and the outcomes of the Knowledge Exchange Framework and will oversee work undertaken as part of the development year for the Knowledge Exchange Concordat.

Many of the key KE programmes and projects that we are involved in are funded by external organisations with well-developed monitoring and evaluation procedures. Individual knowledge exchange projects are monitored against programme and budget, and evaluated against strategic objectives and outcome targets via a range of methods, including:

- reporting to internal steering and advisory groups
- reporting to external funders as required by contract
- internal evaluation
- External (funder) evaluation e.g. mid-term and end-of-programme ESIF evaluations.

We used HEIF to pump-prime the funding of an evaluation unit. This unit undertakes project, programme and policy evaluation for a range of local and national bodies, working with academic subject experts across Edge Hill. However, we also use this evaluation unit to undertake internal evaluation work of key projects. This includes the development of evaluation frameworks (e.g. establishing intervention logic chains,

shaping intervention design, developing monitoring frameworks) and conducting evaluations.

The HEIF and Knowledge Exchange Steering Group reviews progress and outcomes in order to identify lessons that can be learned, shared and acted up on. In practice, this means:

- Understanding what works, and what does not work, in promoting knowledge exchange as an activity at Edge Hill. This ranges from how to best identify, promote, develop and disseminate opportunities to academic staff, through to inputs into the development of a new career progression route for external engagement and knowledge exchange.
- Requesting, receiving, and reviewing Faculty Activity Reports on the development of KE activity at faculty-level
- Reviewing the progress and outcomes of our larger KE projects, with plans to extend our Post-Project Review procedures to smaller KE projects.