

## CIOL/IOLET STRATEGY PLANNING DAY

4 June 2016  
Summary Report

### Context

This was the third annual strategy planning day held jointly by CIOL and IOLET. Two years ago, when the three year planning and budgetary cycles were introduced, we were conscious that we were starting a new process and stood back and took a fundamental look at how we wanted to plan for the future. A facilitated discussion helped us to review our mission, set 5 core values and review our objectives under 5 main headings: Membership; Examinations; Voice of the Profession; Governance; and Modernisation. The outcomes from that meeting were i) a three year 2014-17 plan; ii) the decision to have a rolling 3-year plan renewed and updated annually; iii) renewed mission and values; iv) five high level plans from which operational plans would be developed to meet the new strategic objectives. During the year, we achieved many of those objectives, including the purchase of Terracotta Court, a review of major contracts for services, preparation for the hosted desktop and a shared platform for all CIOL/IOLET IT activity, launch of the new website and appointment of a Business Development Manager for the first time as well as a new Communications and Marketing Manager.

A year later we held a more informal half-day meeting to review and update the existing plan. A highly interactive session allowed for new ideas and thinking to be added to the existing high level plans. One of the main outcomes from the day was recognition of the need to broaden our reach to those working with languages outside of the professions of translating and interpreting. In particular, we needed to engage more fully and more widely with education, universities and business and to ensure that our offer of Membership and Qualifications reflected and supported this. There was very much a feeling of greater integration and collaboration between the two companies and that an integrated presentation and offer to the outside world would bring added strength and value to the Institute as a whole. We moved from 5 high level plans to 4 as much of the Modernisation objectives had been fulfilled – those remaining we largely wrapped up with the Governance Review and therefore incorporated into that section of the Strategic Plan. The appointment of a new Head of Membership really helped to drive this forward and initiated development of a new Membership Pathway to give renewed impetus to broadening membership recruitment and to increase retention rates. Most importantly a cultural shift was initiated with a new and exciting 'can do', 'let's try' approach that meant that by end of the this planning period, the new Membership Pathway is ready to launch and IOLET have successfully bid for the important new MoD examinations contract.

With incredibly important and critical areas of work to complete and implement during the coming 12 months, the decision was taken to focus on the longer term at the Strategic Planning day held in June. The Strategic Plan would be updated separately, particularly in respect of the changing context for language and the (at the time of the meeting) upcoming EU Referendum. In 12 months' time a broader and more

fundamental review of the Strategic Planning process, documentation and content will be undertaken.

But for the June meeting the focus was very much on 'What are likely to be major impacts on the language sector in the next 10-15 years and how well prepared is the Institute to address them?'

## Objectives of the Day

The key objective of the day was to capture the thinking of members of Council and the Trust Board in respect of their specialist areas of expertise on the Institute's preparedness to deal with the likely trends and changes that were to be expected over the next 10-15 years in their own fields. From these we hope to draw out the key impacts likely to have a bearing and influence on the how the Institute approaches development of membership services and qualifications delivery. This might include required actions to bring the Institute ahead of the game in terms of its processes but also, critically, the way in which we may need our membership services and qualifications to adapt to the changing needs of language professionals and the ways in which language services are contracted and delivered. More in depth analysis of the presentations, discussions and workshop notes will be undertaken in the next few months with this feeding into the Strategic Planning review for 2017-2020 which will take place in spring 2017.

## Presentations

Ten members volunteered to present with 2 further written contributions from members not able to be present on the day.

Topics included: applied language qualifications, risks/opportunities for Diploma in Translation, future trends for PSI/Interpreting for business, Language and defence, Bilingual professionals, the potential impact of Brexit, Positioning of The Linguist, Translation technology and collaborative working, wearable translation technologies and the language landscape.

Questions and discussions were largely kept until all presentations had taken place. In the short discussion period following the presentations, four common themes emerged: the role and impact of technology; likely cultural shifts; the importance of branding and positioning; and the need to develop partnerships and collaboration with others.

These common themes formed the backbone structure of the three afternoon workshop sessions (Membership, Examinations and Marketing, Communications & External Relations) with participants asked to consider these themes in the context of the three operational areas in terms of Institute preparedness and requirements for adaptation and change.

## Workshops

The key points on each theme arising from the workshops are summarised below:

### *Technology*

Existing, new and emerging technologies will affect all aspects of the Institute's work. Internal processes must make use of latest technologies and features to enhance member and candidate perceptions of the organisation which is currently still

considered to be rather 'last century' (eg introduction of online registrations/renewals/payments, self-service for members to change personal information etc). For examinations, use of online resources (DipTrans) and the potential for online delivery of examinations needs to be explored. Technologies are revolutionising translation and interpreting profession and the Institute needs to engage much more fully with this aspect of the profession in terms of CPD and collaboration with technology providers.

### *Cultural Shift*

For examinations, diversification is important to move away from the focus to date on translation and interpreting examinations. Being recognised as 'the' provider of applied language examinations, and moving away from examination 'by purpose' to examination 'by level', will help build support for the Institute as the professional leader in its field for all language professionals. Similar trends emerged for Membership as the new pathway sets out paths into membership for new constituent groups (Students, IoLET candidates, Career Affiliates). Qualifications are an important criteria for assessing membership applications and these two areas should work together to create a coherent and cohesive offer. One of the most important cultural 'shifts' is already taking place bringing the work of the two companies closer together to present an integrated face of the Institute to members and candidates alike. This will impact on branding but questions remain to be answered about how to do this whilst retaining the required separation of Awarding Organisation from Membership Body.

### *Branding and Positioning*

Several issues were raised in relation to the current logo and titles used for CIOL and IoLET. Despite separate branding of the two companies, public perception of the Institute is very much focused still on the Chartered Institute. Business development in Asia has brought this issue to the fore where the Royal Charter and the Crest (no longer extensively used) are seen as kitemarks of British quality. The Royal Charter is a valuable brand in itself and need to be exploited more fully – work on this is already underway as part of the new Membership Pathway. Gaining greater visibility and recognition is critical to support developments in both Membership and Examinations. With moves to extend membership and examination services to a wider body of language professionals, the Institute needs to take steps to help the public, government and potential clients understand what is meant by a 'linguist'.

### *Partnerships and collaboration*

It was felt very strongly that to create resilience and opportunity in future, the Institute has to have a much more developed strategy of working with and through others, using the expertise of other organisations (e.g. technology companies, specialists in packing and distribution for exams) in order to take full advantage of development opportunities as they arise. This is a fundamental cultural shift too as for many years the Institute has attempted to do everything internally. Creating links with other organisations (professional bodies, government departments, international organisations) should be a priority and will help to build the recognition we strive for.

## **Next steps**

It was agreed that a note of the meeting would be posted on the website and that a longer summary would subsequently be posted, once the 2016-19 Strategic Plan had been finalised. Given the long term perspective of the discussions, it was acknowledged that the content of the discussions were likely to inform the 2017-20 planning cycle and beyond, more than the current plan for 2016-18.