



**QUARTERLY
STRATEGY PERFORMANCE REPORT
<MONTH> <YEAR>**

PROTOTYPE/TEMPLATE FOR DISCUSSION ONLY













**SECTION A:
STRATEGIC KEY PERFORMANCE INDICATORS
(KPIs)**

PROTOTYPE/TEMPLATE FOR DISCUSSION ONLY

This section will provide a quarterly update against the 20 strategy metrics.

Where there is no new data available since the previous report, the metric box will be greyed with a red border and strike-through and will display the statistics/data from the previous update if relevant.

Where there is new data/statistics, this will be displayed in the metric box along with a movement indicator.

Movement	For metrics where we are seeking to achieve upward tracking	For metrics where we are seeking to achieve downward tracking
Significant improvement		
Moderate improvement		
No change		
Moderate deterioration		
Significant deterioration		

Where a metric is being measured for the very first time, this will be stated.

For metrics which require supporting/qualitative information (eg profiles, impact reports), the information will be attached as appendices and key ‘pull-outs’ and a movement indicator (if relevant) will be displayed in the metric box.

INFORM & SUPPORT

AWARENESS

1 Annual Membership Survey
- % response rate

<Year> **0.98%**

(First measurement)


2 Annual Membership Survey Q7 -
% of responders selecting
options 1,2,3 (awareness)

<Year> **89.0%**

(First measurement)

3 Annual NSS Q26 -
% of responders selecting “N/A”
(proxy for not aware)


<Year> **23.0%**



Previous: <Year> **23.6%**

4 #new visitors
to website & Hoot –
% of total membership
(rolling 12 month figures)

12 months to <month>
28,716 – 16.9%




Previous:
12 months to <month - 3>
18,712 – 11.1%

RELEVANCE

5 Annual profiling of
service/resource users -
% penetration of member
segments


See Profile in Appendix 1,
conducted <xx/xx>

Overall movement trend



6 #returning visitors
to website -
% of total membership
(rolling 12 month figures)


12 months to <month>
48,123 – 28.3%



Previous:
12 months to <month - 3>
48,217 – 28.3%

7 Social Media
Amplification Actions (all Assoc
accounts, incl reps)
– % of total views

3 months to <month> **5.4%**



Previous: **3 months to <month>**
5.9%

8 Annual
Membership Survey
- % service/ resource users who
would re-use or recommend

<Year> **48.7%**

(First measurement)

ENGAGE & INVOLVE

ENGAGEMENT

9

Election participation –
% eligible voters who take part

No new elections to report

Previous:
<election held xx> 1.4%

10

Quarterly activities participation
- #students per activity type &
% of total membership

3 months to <month>
See Appendix 2 for list of
activities and figures

Overall movement trend



11

Quarterly volunteering participation - #volunteers applying for & completing roles

3 months to <month>
See Appendix 3 for list of roles and figures

Overall movement trend



REACH

12

Profiling of election participants – % penetration of member segments

No new elections to report

13

Annual profiling of engaged students – % penetration of member segments

See profile in Appendix 1, conducted xx/xx/xx

Overall movement trend



14

Annual profiling of volunteers – % penetration of member segments

See profile in Appendix 1, conducted xx/xx/xx

Overall movement trend



INFLUENCE & TRANSFORM

IMPACT

15

Annual Membership Survey Q22 - % of responders selecting “agree” options for positive impact statement

<Year> 31.2%

(First measurement)

16

Annual NSS Q26 - % of responders identifying positive for effective representation

<Year> 32.1%



Previous: <Year> 38.2%

17

Annual volunteering feedback – % volunteers identifying positive growth & development

<Year> 77.4%



Previous: <Year> 75.6%

18

Annual Representation/ Service Review – % OU staff identifying positive student impact in committees

<Year> 83.2%



Previous: <Year> 83.1%

19

Qualitative Impact Reporting:

Report on <eg Quarterly CEC Impact Reports> attached at Appendix 4

Report on <eg Annual Student Voice Impact Report> attached at Appendix 5

Report on <eg Volunteering case studies> attached at Appendix 6

ORGANISATIONAL CULTURE

MAINTAIN AN ENABLING
ORGANISATIONAL CULTURE

20

Annual culture pulse survey – % stakeholders selecting “agree” options on living our values questions

<Year> 73.4%



Previous: <Year> 62.4%

20

Annual staff engagement survey – % staff selecting “agree” options on living our values questions

<Year> 68.4%



Previous: <Year> 64.2%



SECTION B: STRATEGY PROJECTS

PROTOTYPE/TEMPLATE FOR DISCUSSION ONLY

Project Number	Project Scope / Description	Implementation Status G = Completed A = In progress R = Not yet started	Project Status (Active Projects Only)	Project Updates (Active Projects Only)
1	Project scope description, copied from the Strategy Projects Summary	G	N/A	Project completed
2	Project scope description, copied from the Strategy Projects Summary	G	N/A	Project completed
3	Project scope description, copied from the Strategy Projects Summary	A	G	This column will be used to provide project updates. Activities completed, outcomes and impacts, work in progress or due to be started. Updates on status of budget/resource/risks, scheduling & critical path. Explanations for A or R statuses. Including any recommendations made or decisions taken on risk mitigation, rescheduling, reprioritisation or budget revisions.
4	Project scope description, copied from the Strategy Projects Summary	R	N/A	Project not yet started
5	Project scope description, copied from the Strategy Projects Summary	A	A	This column will be used to provide project updates. Activities completed, outcomes and impacts, work in progress or due to be started. Updates on status of budget/resource/risks, scheduling & critical path. Explanations for A or R statuses. Including any recommendations made or decisions taken on risk mitigation, rescheduling, reprioritisation or budget revisions.

Project Number	Project Scope / Description	Implementation Status G = Completed A = In progress R = Not yet started	Project Status (Active Projects Only)	Project Updates (Active Projects Only)
6	Project scope description, copied from the Strategy Projects Summary	R	N/A	Project not yet started
7	Project scope description, copied from the Strategy Projects Summary	R	N/A	Project not yet started
8	Project scope description, copied from the Strategy Projects Summary	A	G	This column will be used to provide project updates. Activities completed, outcomes and impacts, work in progress or due to be started. Updates on status of budget/resource/risks, scheduling & critical path. Explanations for A or R statuses. Including any recommendations made or decisions taken on risk mitigation, rescheduling, reprioritisation or budget revisions.
9	Project scope description, copied from the Strategy Projects Summary	R	N/A	Project not yet started
10	Project scope description, copied from the Strategy Projects Summary	G		Project completed



SECTION C: BUSINESS PLANS

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Business Area	Achievements & Deliverables	Issues & Risks
Chief Executive	This column will be used to record highlights, achievements and activities/projects that have been delivered or completed against this business plan in the previous quarter, including outcomes/impacts and recognition to individuals for contributions.	This column will be used to provide updates on any new risks or challenges to the delivery of the business plan, including resource issues, budget issues, dependency challenges and equality impacts.
Deputy Chief Executive (F&R)		
Deputy Chief Executive (S&SE)		
Digital Comms		
Community		

Business Area	Achievements & Deliverables	Issues & Risks
Executive Support & Staff Welfare		
Operations		
Policy & Public Affairs		
Representation		
Research		

Business Area	Achievements & Deliverables	Issues & Risks
Resources & Finance		
Strategy & Change		
Support		
Volunteering		

Appendices

Appendix 1 would contain geodemographic profiles and penetration %s for:

- service/resource users over last 12 months
- engaged students over last 12 months
- volunteers over last 12 months

Appendix 2 would contain #s/%s of students that have participated in events over the last 3 months

Appendix 3 would contain #s of students that have applied for and completed volunteering roles within the last 3 months

Appendix 4 would contain the quarterly CEC impact report

Appendix 5 would contain the Annual Student Voice Impact Report

Appendix 6 would contain new volunteering case studies



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