



**QUARTERLY  
STRATEGY PERFORMANCE REPORT  
JUNE 2021**

**SUPPORT**

**ENCOURAGE**

**EMPOWER**

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# SECTION A: STRATEGIC KEY PERFORMANCE INDICATORS (KPIs)

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This section provides a quarterly update against the 20 strategy metrics.

Where the data collection mechanics have not yet been established and/or no new data is currently available, metric boxes have a strike through. Where data is being reported for the first time and there are no previous statistics to track movement against, this is indicated in the metric box.

Where there are previous statistics, this is 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	 Solid green upward arrow	 Solid green downward arrow
Moderate improvement	 Hollow green upward arrow	 Hollow green downward arrow
No change	 Amber horizontal arrow	 Amber horizontal arrow
Moderate deterioration	 Hollow red downward arrow	 Hollow red upward arrow
Significant deterioration	 Solid red downward arrow	 Solid red upward arrow

For metrics which require supporting/qualitative information (eg profiles, impact reports), the information is attached as further appendices.

# INFORM & SUPPORT

## AWARENESS

### Metric 1

Annual Membership Survey (AMS) - % response rate

**2020 Roll-out 0.80%**  
**2020 Soft-Launch 0.98%**

No new data until 2021 AMS results are available (anticipated Jan 2022)

### Metric 2

Annual Membership Survey Question 8 - % of responders selecting options 1,2,3 (awareness of membership of Association)

**2020 Roll-out 95.1%**  
**2020 Soft-Launch 89.0%**

No new data until 2021 AMS results are available (anticipated Jan 2022)

### Metric 3

Annual NSS Question 26 - % of responders selecting "N/A" (proxy for not aware)

No new data available until 2021 NSS results are published (anticipated July 2021)

### Metric 4

#new visitors to website & Hoot (rolling 12 month figures)

#### Website:

**Year to May 2021 – 218,838**  
**Year to May 2020 – 204,867**  
**(moderate improvement)**



#### Hoot:

**Year to May 2021 – 15,879**  
**Year to May 2020 – 7,937**  
**(significant improvement)**



Continuing improvement in website visitors year-on-year. The most visited pages are shop related (past exam papers, discounts, merchandise) & Totum, followed by societies/clubs/groups and then volunteering roles. The AL contract statement also generated a high level of views. The Hoot statistics are again showing a huge year-on-year growth between year 1 and 2 of the Hoot's operation, reflecting the efforts into promotion, generating content and encouraging student contributions.

# INFORM & SUPPORT

RELEVANCE

**Metric 5**


Service/resource usage – #students per area

[See summary on pg 6](#)

Increased engagement in Societies, significant level of new sign-ups for the new Welsh newsletter, but reduced levels in engagement with newsletters (open rates and click throughs) as is usual at this time of year.

**Metric 6**

#returning visitors to website & Hoot (rolling 12 month figures)


**Website:**  
 Year to May 2021 – 48,011  
 Year to May 2020 – 45,218  
 (moderate improvement)

**Hoot:**  
 Year to May 2021 – 2,389  
 Year to May 2020 – 1,201  
 (significant improvement)

Good growth showing year-on-year. Returning visitors as a % of new visitors year-on-year for both the website and The Hoot have increased slightly year-on-year but could still be improved and this will be a consideration as part of planning content for the new website.

**Metric 7**

Social Media Engagements (Assoc Twitter a/c) – % of total impressions

3 months to May 2021 – 2.13%  
 3 months to Feb 2021 – 2.63%  
 (moderate deterioration)

Slight deterioration, but running at the same average levels as usual (between 2 and 3%). Fewer high engagement tweets in the period to lift the overall level – highest engagement posts (6-7%) were on merchandise, TMAs and bank holiday messaging in April & May.

**Metric 8**

Annual Membership Survey Questions 15 & 16 - % (median) of service/resource users who would recommend

From 2020 survey:  
 Services users – median 88%  
 Resources users – median 71%

No new data until 2021 AMS results are available (anticipated Jan 2022)

Service/Resource Description	Measurement Basis	Measurements	Measurements	Measurements	Change
		Dec 2020	Mar 2021	Jun 2021	
Societies	As at reporting date	22	22	23	Increase
Societies members	As at reporting date	7,045	7,355	7,677	Increase
Shop orders	In quarter prior to reporting date	830	521	417	Decrease
Shop average order value	In quarter prior to reporting date	£33.57	£31.58	£35.42	Increase
Assoc newsletter new sign-ups	In quarter prior to reporting date	588	391	219	Decrease
Assoc newsletter open rates	Average for quarter prior to reporting date	35.5%	32.9%	26.8%	Decrease
Assoc newsletter click through rates	Average for quarter prior to reporting date	4.8%	3.8%	2.6%	Decrease
Welsh newsletter new sign-ups	In quarter prior to reporting date	148 (launch)	84	232	Increase
Welsh newsletter open rates	For issue prior to reporting date	-	39.9%	34.4%	Decrease
Welsh newsletter click through rates	For issue prior to reporting date	-	8.2%	4.8%	Decrease
YouTube Video Views	In quarter prior to reporting date	3,482	2,529	2,118	Decrease
TOTUM cards	For 12 months prior to reporting date	13,602	13,027	12,974	Decrease
Peer Support Users	For 12 months prior to reporting date	90	115	125	Increase
Library Support Requests	For 12 months prior to reporting date	65	70	91	Increase
Ouset successful applications – number and % of all apps	Most recent presentation/academic year	(2020 J/K) 46 (90%)	(2021 E/B) 9 (75%)	-	-

# ENGAGE & INVOLVE

## ENGAGEMENT

**Metric 9**  
 Election participation – % eligible voters taking part

**Main elections:**  
 2020 - 1.13%  
 2018 - 0.82%

**By-elections:**  
 2020 - 0.75%  
 2019 - 0.76%  
 2018 - 0.51%

**No new elections held since 2020 main election & by-elections**

**Metric 10**  
 Activities participation - students per activity type

[See summary on pg 8](#)

We are continuing to see good levels of growth in student participation/sign-up across all community club and group activities.

**Metric 11**  
 Quarterly volunteering participation - volunteers active in roles and applications

**Active in roles – Year on year tracking:**  
 3 months to May 2021 – average 343  
 3 months to May 2020 – average 242  
 (significant improvement)

**Active in roles – month on month tracking:**  
 May 2021 – 328  
 Apr 2021 – 346  
 Mar 2021 – 355

**Applications:**  
 3 months to May 2021 – applicants 162 (% new volunteers = 89%)  
 3 months to Feb 2021 - applicants 42 (% new volunteers = 69%)

There has been significant growth in active volunteers year on year due to the improvements the team have made to our recruitment process, encouraging more new volunteers to the Association. As seen by our % of new applicants, one of the most successful methods for this was introducing flexible micro volunteering opportunities for those who may have not volunteered before. The dip in active roles from March 2021 reflects resignations within the CEC and CCR cohorts, along with a small reduction in Peer Supporters.

Activity Description	Measurement Basis	Measurements Dec 2020	Measurements Mar 2021	Measurements May 2021	Change
DSG members	As at reporting date	585	643	674	Increase
OU Pride members	As at reporting date	578	606	641	Increase
BAME Group members (excl FaceBook)	As at reporting date	-	72	86	Increase
Clubs	As at reporting date	56	76	79	Increase
Club members	As at reporting date	10,143	11,509	11,587	Increase
Number of online events & meet-ups	In quarter prior to reporting date	55	31	51	Increase



## ENGAGE & INVOLVE

REACH

### Metric 12

Profiling of election participants

**No new elections held since 2020 main election & by-elections**

### Metric 13

Annual profiling of engaged students

**Not yet available**

### Metric 14

Annual profiling of active volunteers

An anonymised profile has been produced for all volunteers active in roles during the period January 2020 to March 2021 – this is first profile we have generated for our volunteer cohort – see Appendix 2.

In comparison to the overall profile of the OU student body, we are seeing under-representation of younger students (35 and under), newer students (Level 1) and male students. Other demographics track largely in line with the overall OU student profile with only slight skewing in some criteria.

The next stage of this work is to determine whether different types of roles show differences in demographic characteristics to the volunteer cohort as a whole.

## INFLUENCE & TRANSFORM

### IMPACT

#### Metric 15

Annual Membership Survey Question 25 - % of responders agreeing that the Association has a positive impact on their student experience

**2020 Roll-out 38.4%**  
**2020 Soft-Launch 32.1%**

**No new data until 2021 AMS results are available (anticipated Jan 2022)**

#### Metric 16

Annual NSS Question 26 - % of responders identifying positive for effective representation

**No new data available until 2021 NSS results are published (anticipated July 2021)**

#### Metric 17

Annual volunteering feedback – % volunteers identifying positive growth & development

**Data not yet available**

#### Metric 18

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

**2019 Review 82.0%**  
**No new data available until next review August 2021**

## INFLUENCE & TRANSFORM

### IMPACT

#### Metric 19

#### Qualitative Impact Reporting:

See CEC Quarterly Impact Reports (separate CEC paper - 07/21/01)

Appendix 3 – EDI Conference Impact Report

Appendix 4 – Micro-volunteers Initial Impact Report

Appendix 5 & 6 – Impact Update prepared for May 2021 OU Council Meeting

## ORGANISATIONAL CULTURE

MAINTAIN AN ENABLING  
ORGANISATIONAL CULTURE

### Metric 20

Annual Membership Survey Question 26 – % responders selecting 'agree' options on whether the Association is living its values

#### Integrity:

2020 survey – 42.3%

#### Equality & Inclusivity:

2020 survey – 46.1%

#### Openness:

2020 survey – 44.3%

#### Collaboration:

2020 survey – 42.7%

No new data until 2021 AMS results are available  
(anticipated Jan 2022)



# SECTION B: STRATEGY PROJECTS UPDATES

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Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<p><b>Project 1</b></p> <p><b>Initiation Status:</b></p> <p>Workstream 1A – Complete</p> <p>Workstream 1B – In Progress</p>	<p><b>GREEN</b></p>	<p><b>Overall Scope:</b> Improve our understanding of student needs, expectations and motivations and conduct a regular review of our services, engagement activities and communications.</p> <p><b>Workstream 1A: Conduct membership research and analysis.</b> Develop and launch the Annual Membership Survey to gain membership feedback. The survey will provide valuable on-going data for strategic KPI tracking, provide inputs for service/activity reviews and help to inform business decision-making.</p> <p><b>Workstream 1B: Service &amp; Activity Reviews.</b> Create the process for an annual service and activity review and facilitate the first such review before transitioning the process into BAU. The annual reviews will enable us to assess, on an on-going basis, the effectiveness and impact of our work and enable informed decision-making on resource allocation/prioritisation.</p>	<p><b>Workstream 1A:</b> The AMS has now been transitioned into Business-as-Usual activities and sits within the Strategy &amp; Research Business plan for delivery and reporting from the 2021-22 AY onwards. This project workstream is therefore no longer being reported on within the strategy projects portfolio.</p> <p><b>Workstream 1B:</b> The CEC approved the proposal to delay the first annual service/activity review until the results of the AMS roll-out were available. It is anticipated that this workstream will be able to get underway c. June/July 2021, subject to project resource capacity. The activity is currently being scoped and a timeline developed.</p>

Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<p><b>Project 2</b></p> <p><b>Initiation Status:</b></p> <p>Phase 1 – Complete</p> <p>Phase 2 – In Progress</p>	<p><b>GREEN</b></p>	<p><b>Overall Scope:</b> Commission a study into the feasibility of providing individual representation for students.</p> <p><b>Phase 1:</b> Identify needs, assess options and develop recommendations and funding requirements. Prepare a full business case for presentation to OU PVC-Students.</p> <p><b>Phase 2 (subject to funding provision):</b> Develop and implement individual representation resources and services for a fixed pilot programme period. The pilot programme will provide ‘proof of concept’ for the realisation of the benefits identified in the Phase 1 business case. It will also provide the evidence base for the development of a case to secure additional funding to allow the permanent inclusion of individual representation for students in the Association’s services portfolio.</p>	<p><b>Phase 2:</b></p> <p><b>Completed:</b></p> <ul style="list-style-type: none"> <li>•Project Governance - Project plan, stakeholder map, RACI matrix and scope statement are complete. Action and RAID log is being using to track daily tasks as well as a budget tracker template.</li> <li>•Established ways of working with casework office.</li> <li>•Mapping of the website and collating of resources is currently in progress.</li> <li>•Requirements have been submitted for the new website and the discussion has begun about capabilities of the new website provider.</li> <li>•Promotion will begin in mid-July.</li> </ul> <p><b>Key actions/next steps to complete:</b></p> <ul style="list-style-type: none"> <li>•Creating a mechanism to capture time and type of cases.</li> <li>•Casework office has provided triaging forms used for OU complaints. A similar approach will be adopted and a triage form will be created.</li> <li>•Further work on comms plan and risk/equality assessments</li> </ul> <p><b>Risks &amp; Issues</b></p> <ul style="list-style-type: none"> <li>•Resource hub will currently be going live before web implementation of new website.</li> <li>•No budget, beyond provision for staff cost, currently ringfenced for this financial year, but strategy budget can be available for spend prior to 1/8/21 if required.</li> </ul>

Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<p><b>Project 3</b></p> <p><b>Initiation Status:</b> Not yet started</p>	<p>N/A</p>	<p><b>Scope:</b> Implement a student support resource library.</p> <p>Explore opportunities to expand our student support services through partnerships with external service providers, support agencies and societies.</p>	<p>Currently no anticipated start date.</p>



Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<p><b>Project 4</b></p> <p><b>Initiation Status:</b> In Progress</p>	<p>GREEN</p>	<p><b>Scope of work:</b> Map the student journey from registration through to graduation, identifying comms and engagement touchpoints where the Association can meet student needs and expectations at key stages of their journey. Provide comms &amp; engagement recommendations to the project team delivering Strategy Project #15 by the end of June 2021.</p> <p><b>Project Required Outcome:</b> This work will contribute to the aim of creating meaningful on-going connections and communications with OU students at all key stages in their student journey.</p>	<p>The project group met and agreed to proceed with our proposed sectioning of the student journey. These six sections (key stages) will serve as a structure for suggestions and a layout for the project group engagement recommendations. They are:</p> <ul style="list-style-type: none"> <li>•Pre-study</li> <li>•Initial engagement</li> <li>•Learning</li> <li>•End of module</li> <li>•Results</li> <li>•After studying</li> </ul> <p>A forum has been created for the project group to work asynchronously in the hopes of encouraging input from all members. The group have been discussing two sections a week and are due to finish w/c 14 June. Engagement in the forums is good so far. We are also providing Micro-Volunteers with the weekly prompts to generate some additional student feedback – this input will be supplemented with ongoing work by the Strategy &amp; Research team.</p> <p>The project leads are planning to pull the recommendations together and get final group input w/c 21 June.</p>

Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<p><b>Project 7</b></p> <p><b>Initiation Status:</b></p> <p>Workstream 7A – In Progress</p> <p>Workstream 7B – Not yet started</p>	<p><b>GREEN</b></p>	<p><b>Workstream 7A:</b> Create new communities where students can benefit from social interaction and informal mutual support.</p> <p><b>Workstream 7B:</b> Create more opportunities for students to support other students through volunteering roles that are effective and adaptable to student needs.</p>	<p><b>Workstream 7A</b> was initiated in March 2021.</p> <p>Our Business Case for an Association Mobile App Test and Learn project was submitted to the OU’s Digital Strategy Steering Group (DSSG) in May 2021. The first stage of the project was approved and is due to commence in early June. The OU’s Design Technology team have engaged a User Experience expert to lead on the exploratory work. We have submitted our stakeholder map to them and they will be conducting interviews shortly to fully understand the user needs. Interviews will take place with micro-volunteers, key CEC members and key staff team members, as well as representatives from Societies, Clubs and Groups.</p> <p>At this early stage in the project, all is on track. Current Project Lead is working on this alongside other managerial workstreams on a part time contract of 2 days per week. A staffing request will be submitted to the Trustees for support to this project to ensure enough capacity is available to achieve success within timeframes.</p> <p>Once the scoping exercise is complete there is some risk related to the cost of the recommendations, the project lead will be mitigating where possible but the outcomes may be out of budget for our organisation. This will be closely monitored and solutions explored as we go.</p>

Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<b>Project 8</b>  <b>Initiation Status:</b> Complete	<b>GREEN</b>	<p><b>Overall scope:</b>            Complete an analysis of the Association’s internal and external stakeholders in order to develop and implement a stakeholder engagement plan.</p> <p><b>Workstream 8A:</b>            Stakeholder mapping exercise – identify all internal and external stakeholder groups and develop an understanding of the importance, contributions and potential impacts of each group for the successful delivery of our strategy.</p> <p><b>Workstream 8B:</b>            Develop and implement a stakeholder engagement plan to support the delivery of our strategic aims and objectives. The plan will include the objectives and aims of any engagement/comms with each of the stakeholder groups and will be used to inform decisions on the choice of engagement/comms channels, comms content, timings and priorities. Stakeholder analysis and mapping will also provide inputs for strategic projects #6 &amp; #9.</p>	<p><b>Workstream 8A:</b>            The stakeholder maps have now been generated. Three maps have been created, one for the OU Students Association, one for the OU and a third for the external stakeholder environment. On-going maintenance of the stakeholder maps will pass across into Business-as-Usual activities with central access and allocated ownership and responsibilities.</p> <p><b>Workstream 8B:</b>            The external stakeholder engagement plan is now feeding into policy &amp; public affair work through the relationship with our new political monitoring service providers, DeHavilland. It has been shared with them to inform the types of information and opportunity they alert us to. The OU and internal stakeholder engagement plans reached a point where the next natural step was to add communication planning into the work. This work will now be consolidated into Strategy Project #15 which includes the creation of an Association-wide marcomms plan incorporating the development of communications/engagement plans for these key stakeholders.</p> <p>As a result, this project is now considered complete, with any remaining work under Workstream 8B being having been consolidated into Project #15.</p>

Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<b>Project 9</b>  <b>Initiation Status:</b> In Progress	<b>AMBER</b>	<p><b>Revised Overall Scope:</b></p> <p>To develop a Representation Action Plan to support the shared goals of the Association and Open University to ensure Student Voice is effectively heard at all levels of the University to improve outcomes for students. This work will aim to remove barriers to inclusion, increase engagement.</p> <p><b>The action plan will:</b></p> <p>Develop, in conjunction with the OU, a shared Code of Practice for academic representation with the aim of improving the effectiveness of student voice within OU governance.</p> <p>Support the University's own Student Voice Action Plan</p> <p>Develop shared principles for best practise for Student Engagement, working with key OU stakeholders to promote the standards and embed student engagement in OU activities and projects.</p>	<p>The institutional framework task and finish group will shortly be coming to an end and the final document from the task and finish group will play a big part in guiding the creation of the code of practice. Separate meetings with key member of the Student Association and the University student voice team have happened. Discussions in the separate meetings included picking this project work up from where it currently is.</p> <p>A meeting took place on the 7th June where the focus was on identifying stakeholders in or affected by the project and looking at grouping similar stakeholders together so that key messages can be targeted effectively. It was agreed to carry this work forward by looking to align with one of the areas in the OU's existing QER action plan - Supporting &amp; Improving Academic Representation (meeting scheduled for 17th June).</p> <p>Further work to be done to create a specific action plan/working group to work on the development of the shared Code of Practice, to include the involvement of student representatives.</p> <p>Status is AMBER due to the need for ongoing evolution of the action plan and approach.</p>

Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<p><b>Project 10</b></p> <p><b>Initiation Status:</b> Not yet started</p>	<p>N/A</p>	<p>Establish a process for authorising, funding, supporting and running campaigns.</p> <p>Produce a manifesto for life-long learning.</p>	<p>Currently no anticipated start date.</p> <p>Work has been carried out independently of the strategy projects portfolio to develop manifestos as part of the Policy &amp; Public Affairs agenda and to look at mobilisation campaigns.</p> <p>The viability of this work remaining as a discrete project will be assessed.</p>

Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<p><b>Project 11</b></p> <p><b>Initiation Status:</b> Complete</p>	<p><b>GREEN</b></p>	<p>To commission an external review of the OU Student Association governance structures and mechanisms that will result in clear and achievable recommendations for change that can lead to improvements in efficiency and effectiveness of the organisation.</p>	<p>This project, as scoped, has been completed. The final report of recommendations for change was finalised and presented to CEC, staff and Trustees in April and May 2021 as planned.</p> <p>In terms of next steps: at their meeting on 6 May 2021 the Board of Trustees(BoT) accepted the report and recommendations in full and approved progression into implementation in principle, subject to an action for the Governance Review Working Group to be re-convened to undertake detailed implementation planning with a view to a paper containing this detailed implementation plan being presented back to the BoT for approval at their next meeting on 27 July 2021.</p> <p>The Working Group met on 17 May and agreed an approach to implementation planning whereby the Working Group (with the additions of Sue Maccabe, Beth Metcalf and Dan Moloney) will be focusing on the detailed planning for four areas of the recommendations: Behaviour Governance (which will be led through the existing Culture Review Group); Student Leadership &amp; Representation; Board of Trustees; and Annual General Meeting. Other recommendations within the review’s final report are being passed on, either to business as usual or to working groups/projects already in place (e.g. EDI and Elections Review). The Working Group are meeting on 24 June and 14 July to finalise the plans ready for presentation to Trustees on 27 July.</p> <p>The Strategic Projects Assurance Group will determine how to report on the implementation phases of the recommendations, either continuing to report against Project #11 or as a new project/series of projects.</p>

Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<p><b>Project 12</b> <b>Initiation Status:</b> In Progress</p>	<p>AMBER</p>	<p>Identify a model of ‘One Team’ working and produce a ‘protocol’ for student representatives and staff members identifying clear expectations.</p> <p>Communicate a ‘One Team’ message and intent, devising a ‘One Team’ action plan and designing/leading ‘One Team’ sessions and activities.</p>	<p>The ‘One Team’ initiative was introduced, but project update reporting mechanics had not been created. The work stalled due to the pausing of work by the Culture Review Working Group. This work is being reinitiated as part of the work to implement the Governance Review recommendations.</p>
<p><b>Project 13</b> <b>Initiation Status:</b> Not yet started</p>	<p>N/A</p>	<p>Devise an agenda that highlights, encourages and celebrates our stated values.</p>	<p>Currently no anticipated start date. It is possible that this work may also be incorporated into the work to implement the Governance Review recommendations.</p>

Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<b>Project 14</b>  <b>Initiation Status:</b> In Progress	<b>GREEN</b>	<p>Develop and implement an action plan to further the advancement of equality, diversity and inclusion (EDI) throughout all Association policies, activities and ways of working.</p>	<p>This project, as initially scoped, has been completed - the equalities action plan having been completed and shared in Q1 2021. The EDI Working Group has continued, however, to report progress on implementation of the action plan via the Strategy Projects Portfolio. The Working Group is still awaiting the decision from the BoT around the change to a Committee, if we remain a Working Group we hope that we can transition to the Committee’s proposed Terms of Reference which will include a larger membership and have much greater feedback from students.</p> <p>Key areas of progress this period have been on:</p> <p><b>Pledge 3</b> – Our first EDI Conference went really well, we are currently collecting participant feedback and also planning to seek feedback from volunteers who did not attend to try and maximise attendance at future events.</p> <p><b>Pledge 8</b> – We are scheduling posts on the Association’s LinkedIn profile or articles and blogs written by people of colour.</p> <p><b>Pledge 12</b> – We have begun working with the OU on a number of projects.</p> <p>There are two new areas that have been added to the action plan:  <b>EDI Strategy</b> (creating an EDI Strategy that will become an enabling strategy to our main strategy) and <b>Deep Listening</b> (from the Governance Review).</p> <p>The Strategic Projects Assurance Group will determine whether this on-going work on the EDI agenda should continue to report progress within the strategy projects portfolio or is ready to transition into Business-as-Usual activities/projects.</p>



Project Number	Project Status (Active Projects Only)	Project Scope / Description	Project Updates (Active Projects Only)
<p><b>Project 15</b></p> <p><b>Initiation Status:</b> In Progress</p>	<p>AMBER</p>	<p><b>Overall Scope: Develop Comms Strategy and Marcomms Plan.</b></p> <p><b>Part 1: Develop Association Communications Strategy</b> in same format as other enabling strategies (Volunteering &amp; Research) incorporating aims (linked to strategic aims), objectives and measures of success.</p> <p><b>Part 2: Develop Marcomms Planning Tool</b> by merging comms matrix work to date with stakeholder engagement outputs from Project #8. Planning tool to identify external/OU/membership audiences, audience comms objectives, audience messaging themes and channels/timing considerations.</p> <p><b>Part 3: Develop Association Marcomms Plan for 2021-22 AY</b> with clearly identified actions, responsibilities/accountabilities and monitoring/evaluation mechanisms.</p> <p>This project incorporates the two further strategy projects that were initially separately scoped:</p> <p><b>Project #5</b> (the development of a Student Engagement Value Statement) and <b>Project #6</b> (working with OU principal stakeholders to promote, sign-post and support the Association.)</p>	<p>Part 1 – the development of an Association Communications Strategy – is almost complete with just a few final revisions to be made in relation to evaluation measures.</p> <p>There has been a delay in commencing work on Part 2 which could have potentially delayed the final delivery of Part 3 by c4-6 weeks. This was unavoidable due to the sheer scale of work involved in the new website project and other comms commitments and the need to prioritise that work due to critical milestones on the website project.</p> <p>Following a review by the Strategy Projects Assurance Group, a revised approach to the work on Parts 2 &amp; 3 has been agreed which will enable a partial Marcomms plan (August to December) to be initiated at the start of the academic year, incorporating the Pre-Study and Initial Engagement recommendations from Strategy Project #4 (these recommendations being due for delivery at the end of June).</p> <p>Overall status is amber due to ongoing risks in relation to resourcing/capacity and delivery timelines.</p>



**SECTION C:  
BUSINESS PLANS UPDATES**

Business Area	Achievements & Deliverables	Issues & Risks
Chief Executive	<p>We should take the opportunity to recognise the huge progress we have made in a number of areas with the strategy, both in terms of actions/projects completed and progressed and in terms of the achievements around our performance. Huge thanks to everyone involved, whether CEC member, Trustee, volunteer or staff.</p> <p>The Governance Review has been completed and approved in principle for implementation and the changes are exciting for the future of the Association.</p> <p>We've seen some fabulous support for the excellent manifestos produced for the elections in Wales and Scotland and the support from the OU teams in the Nation offices has been very much appreciated.</p> <p>Management recruitment has been completed and the new structure is in place, with other staff recruitments also mostly completed and new teams inducted.</p>	<p>Capacity and workload remains a challenge in some quarters: for CEC with the number of vacancies (reinforcements on the way hopefully) and in some aspects of the staff team's work, e.g. policy and public affairs, EDI, conference PM, community team etc. We also have an External Trustee vacancy to fill. Work is underway to progress these and get back to fuller capacity.</p> <p>The workload challenges ahead with the delivery of the governance review, conference, the new website and our 50th etc should not be underestimated but we will need to work together to find a way through this.</p> <p>Ouset strategy work is ongoing, with a view to being resolved by the summer.</p>

Business Area	Achievements & Deliverables	Issues & Risks
<p>Deputy Chief Executive (Finance &amp; Resources)</p> <p>FINAL REPORT for this role as the activities will transfer to the new senior management team or to the Head of Finance and Resources business plan as appropriate to the remits.</p>	<p>Our investment policy review is complete with the working group now proceeding to implementation. The working group, with an extended remit, also met to review the Universities UK consultation documents on the USS pension scheme, so I could liaise with the OU's Group Finance Director on the consultation response. A summary of this was posted on the Board of Trustee forum and staff were also updated. Special thanks to working group colleagues - Mark Price, Magda Hadrys, John James, and Matt Porterfield - for meeting at short notice to put together our feedback to the OU on their draft response.</p> <p>The Licence to Occupy and Shared Services agreements with the OU have progressed, as has our GDPR action plan. Sue Maccabe deserves special recognition here for leading on identifying GDPR awareness training needs for all stakeholder groups and liaising with our DPO on content and delivery.</p>	<p>With changes in the senior management team and several new members of staff joining the team, the time needed for induction and transition has impacted on ability to progress my own CPD. However, this is temporary and so time should become available to pick this up again soon.</p> <p>I still need to consider and share with the Chief Executive, the learning from Company Secretary training, reflect on the outcome of the Governance review and identify any beneficial or necessary changes.</p>

Business Area	Achievements & Deliverables	Issues & Risks
<p>Director of Membership Services</p>	<p>My main focus has been on the governance review and how we will implement the behaviour governance and electoral reform recommendations.</p> <p>The Elections Review Working Group have worked hard to address the level of detail needed going forward and will be sharing their recommendations with the Trustees in July.</p> <p>Working with Sarah we are also finalising the membership of the Culture Working Group and putting together an implementation plan for the trustees before arranging our next Culture working group meeting to begin putting this into action.</p> <p>This is an exciting time for the Association to ensure that we have a zero-tolerance approach to poor behaviour, ensuring volunteers and staff have the confidence and tools to challenge this behaviour and a complaints system which supports our aims.</p>	<p>There has been a lot going on which much attention needed on a couple of confidential incidences with the University. This will need continued work to ensure we have mutually agreed how we will work together on these issues going forward.</p> <p>Community, Support and Volunteering and Representation teams are all working below capacity, though in the next quarter, recruitment and the (hopeful) approval of our staffing requests will resolve this.</p>

Business Area	Achievements & Deliverables	Issues & Risks
Community	<p>It has been an important time for the community team to reflect and take stock of our work whilst continuing to support the efforts of meet-ups, societies and clubs.</p> <p>The insight gathered from the Community Consultation sessions, and ongoing work to review our offering to students through the Meet-Ups Review Project amongst other things gives us a lot to think about when planning and prioritising our future work.</p> <p>We are pleased to have been able to offer additional training opportunities to meet-up hosts, societies and clubs and we hope to continue this, focussing on sessions that will be of most benefit to our volunteers.</p> <p>We are excited about the potential App project and keen to hear the results of the Test and Learn project.</p>	<p>We continue to work hard to prioritise our work to deliver the best for students and volunteers.</p> <p>We hope some extra staff resource in the coming months will enable us to do more.</p> <p>Recent resignations have left some gaps to fill so we look forward to the co-option of new volunteers into those roles.</p>

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Digital Comms	<p>Heather has been liaising with the Management Team and received support from Sue Maccabe and Verity Robinson in arranging for the leaflet she’s designed to be printed and sent to new 21J students. This is something which has been on VP Engagement’s wish list and been an ambition of various others at the Association for a number of years.</p> <p>Internally, we’ve gained more proficiency with our online planning tool, Notion as a team, which should help us deliver more consistent and transparent comms support. James continues to manage the events Outlook calendar. Staff from a wider array of teams are now using this calendar and attending operational meetings about its use.</p> <p>Andy, our Optimisation Officer, has gained more independence and is making great progress towards taking on the management of the website project. We are on the cusp of signing an agreement with MSL so that the real work can begin. In the meantime, we’ve made good use of this period by updating teams on which of the operational/technical requirements they requested can be fulfilled and collating information about what data they will need migrating to the new site.</p>	<p>As last time, the website project is a major area of focus. We continue to take care not to allow it to distract us from other priorities.</p> <p>We still expect that the wider staff team are likely to take a good amount of leave in this coming period and we will have to plan how we manage/schedule the cross-team working involved in the website project carefully.</p> <p>We still haven’t returned to filming and taking photos on campus.</p>

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Executive Support & Staff Welfare	<p>The last quarter has been an extremely busy one as I have been operating the Executive Support and Staff Welfare team by myself, undertaking my old role and new managerial role at the same time. Despite this, the April CEC went well and even though the agenda was really busy, it ran to all the anticipated timings. There were some great sessions over the weekend, which included Julian Lomas from Almond Tree Consulting presenting the findings from the Governance Review and an ‘understanding your own stress drivers session’.</p> <p>Staff Recruitment has been a success with Sarah Smerald appointed as Volunteering and Representation Administrator and Georgie Moore appointed as Executive Support Assistant. Allan Musinguzi was appointed as Head of Volunteering and representation which meant Nicky Powell gained the Senior title for this team. Amy Undrell has settled into her new role as Student Advisor Sammi Wright has returned from maternity leave to join back with the Student Support team 3 days per week. The last quarter has also seen staff taking up the training opportunities, with the majority of the staff team attending the Effective Time Management training and all attending the GDPR workshops.</p>	<p>Success Factors continues to cause our team problems, with no advancements or progress being made in getting myself admin access to the system. The inability to oversee staff records complicates any changes that need to be made. We have recently seen the knock-on effect this can have, as we faced problems with staff’s payroll. Rob is due to chase Margaret Hudson, the Head of HR business partners, to try escalate the issue and bring it to their attention once again.</p> <p>New starters have been facing issues on their first day as over the last four recruitments, there has been a delay in receiving their laptop. Alison and I have been conversating and have drafted a new procedure in the hope this will prevent the delays of the laptops. This will be trialled on the next round of recruitment.</p> <p>Observers cannot access the online forum CEC meeting and the Chairs of the Groups also do not have access to their thread to respond to questions that come in from the CEC. We are hoping to get this sorted for the July CEC.</p>



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Finance & Resources	<p>At the beginning of May, the Controls on Expenditure policy came into effect. There are some early indications this is triggering colleagues to consider more carefully value-for-money in their decision making.</p> <p>Work on reviewing our investment policy has led to the development of a cashflow forecasting model to support investment decision-making. The current year forecast will be included in the finance reporting pack to Trustees. This will now be further developed to cover a 5-year period, albeit in less detail.</p> <p>We now have 2 laptops available for short term loan to volunteers and a policy and procedure has been put in place to manage this. One of these laptops has been issued.</p>	<p>The potential for significant increases to pension contributions still looms large for both employees and employers. The main concern for the Association is that the increases are unlikely to be fully covered by the inflationary increase to subvention. We continue to “knock on the door” of the OU to voice our concerns.</p> <p>Budget planning for 2021-22, in the current climate, and without a crystal ball, is tricky. Trustees have therefore approved parameters to work within in formulating a plan. This allows us to budget to spend up to £100k more than the income expected for the year. We are aiming to be able to submit a more detailed budget plan to July’s meeting of the Board of Trustees.</p> <p>Whilst some of the issues associated with the introduction, by the OU, of a new finance, payroll and HR system have been resolved, others remain. A few payroll errors are creeping in, creating extra work for all concerned in resolving these and inconvenience for the individuals affected.</p> <p>There is more work to do to improve and regularly test the effectiveness of internal controls and limited capacity to apply to</p>

Business Area	Achievements & Deliverables	Issues & Risks
Operations	<p>Ongoing monitoring of the target profit margins resulting in good levels of income (measured against annual income target)</p> <p>Successful implementation of the new OUSET applications and supporting documentation and opening of the application window for J/K presentation</p> <p>First ‘OUSET Funding Criteria and Strategy Workshop’ delivered on its objectives to narrow down the future funding priorities for the Trust</p> <p>Successful implementation of the webstore fix resulting in opening up trade with the EEA (including EORI registrations)</p> <p>Exam papers available to all OU students</p>	<p>Lack of control over international orders when they leave the UK and application of local tax.</p> <p>Unknown impact of future sales on the predicted year-end income (for the 20/21 financial year).</p> <p>Uncertainty over the return of the face-to-face events and their impact on income and operational activities.</p>

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<p>Policy &amp; Public Affairs</p>	<p>The manifestos for the Scottish and Welsh elections have been received incredibly warmly, with great support from candidates across the political spectrum and from the OUIS and OUIW. Many detailed replies were received, providing stories of candidates’ or their families’ experiences of the OU.</p> <p>The student email campaign, enabling students to easily send our manifesto to their local and regional candidates received better uptake in Wales than in Scotland due to better access to the very active Wales Association Facebook Group, but even a small engagement with this tool would have a large impact.</p> <p>As well as pushing our policy agenda, this has been an excellent profile building exercise, enabling us to establish the Students Association as independent from the OU in Wales and Scotland.</p>	<p>Having stepped into the role of Director of Engagement, I haven’t been able to deliver as much policy and public affairs work as in previous months. It has been largely limited to following up on the Welsh and Scottish manifesto activity.</p> <p>Additionally, progress on the next phase of the nations volunteer panels has stalled, but I am in conversations with Allan and Ellie regarding the Volunteering &amp; Rep Team taking a lead on this moving forward to progress it</p> <p>We currently have no AARs in role, and this presents a risk to our ability to build our student communities in the nations and develop our relationships with the OU offices in the nations.</p>

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<p>Strategy &amp; Research</p>	<p>Our current Strategy Performance Report is showing that we are making good progress against our strategic key performance indicators (KPIs) and success metrics, especially around awareness, engagement levels, and use of our services. We have been able to activate more projects within our strategy projects portfolio including major projects on student journey mapping and the development of our comms strategy and marcomms plan.</p> <p>We were delighted to be able to share our strategy achievements via the delivery of an update to the OU’s Council and in a session with the OU’s Senior Team and we are in the process of planning a strategy review as we are now approaching the half-way point in our current strategy.</p> <p>We have completed the analysis of the response data from the Annual Membership Survey roll-out and we are busy planning the initiation of our major EDI Research Programme. We also recently completed our first set of research activities with our new micro-volunteering team, which provided rich insights into student needs and expectations to feed into our student journey mapping project.</p>	<p>We have had a few resource/capacity challenges which have affected our ability to progress work on our KPIs benchmarking project.</p> <p>One of our longer term research projects - exploring the creation of a Community of Research Practice - has also been impacted by both resource/capacity and the WFH arrangements.</p>

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Support	<p>Great progress has been made in terms of evaluation for both the Peer Support and Library study Volunteer services; this will enable us to obtain feedback from users and help us to make continual improvements.</p> <p>The Association will have a leaflet included in ALL module packs in 21J, which will greatly contribute to raising awareness of the Association and the work that we do in supporting students.</p> <p>Due to the success of our Library Study support scheme, which enables volunteers to conduct research on behalf of Students in Secure Environments (SiSE) who do not otherwise have access to library services and research material, FASS will be increasing the number of masters and post grad modules available to SiSE.</p> <p>The EDI Conference for Student Volunteers went well and we are working on a schedule of further events.</p>	<p>The Projects Officer in the Support Team has returned on a part time basis which means we are still running at reduced capacity.</p> <p>We have lost a number of volunteers in the last year from our Peer Support and Library Study Volunteers services and we will be looking at the reasons for this and how we can avoid losing large number of volunteers in the future.</p>

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Volunteering & Representation	<p>The team was involved in organising the Equality, Diversity and Inclusivity conference for all volunteers and staff at the student association. The sessions were educative, informative, and inspirational.</p> <p>We have begun work on building volunteer profiles in order to understand the diversity and representativeness of the volunteer cohort. This work will help to support our EDI aims and objectives.</p> <p>There was a positive expression of interest for the volunteer pathway with over 70 students signing up.</p> <p>Training for newly appointed reps is currently being organised and will be ready to deliver on 17th and 18th July.</p>	<p>Student representative’s recruitment closed and there appears to be small number of applications compared to what was expected. This might be due to the timing of the recruitment process which took place from early April when students start to get busy with end of module assignments and exams.</p> <p>The next three months continues to be a busy period for the team as transition for Head of team continues and induction and introductions for the new Admin progress.</p> <p>There are still more volunteer recruitments to be done. The low application for student rep roles will require opening another round of recruitment to fill in vacancies that exist after the appointment process.</p>



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