

# QUARTERLY STRATEGY PERFORMANCE REPORT SEPTEMBER 2020



# SECTION A: STRATEGIC KEY PERFORMANCE INDICATORS (KPIs)



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

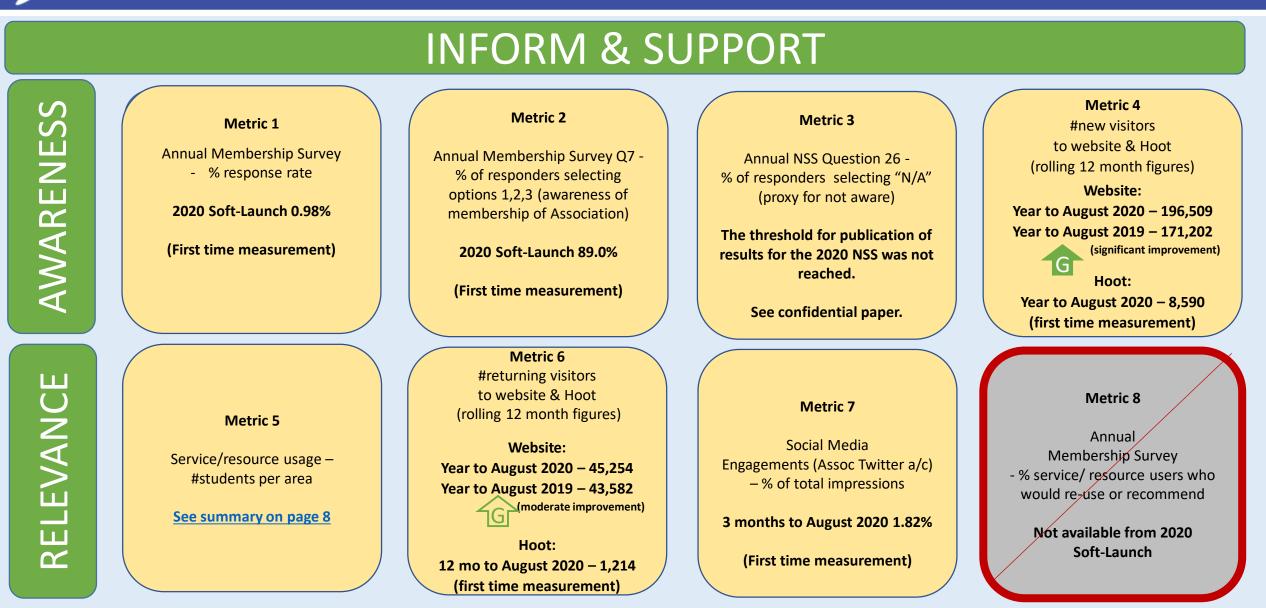
This is the first live performance report. Where the data collection mechanics have not yet been established and no data is currently available, metric boxes have a strike through. Where data is being reported for the first time and there are no previous statistics to track movement against, this is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

Where there are previous statistics, this is displayed in the metric box along with a movement indicator.

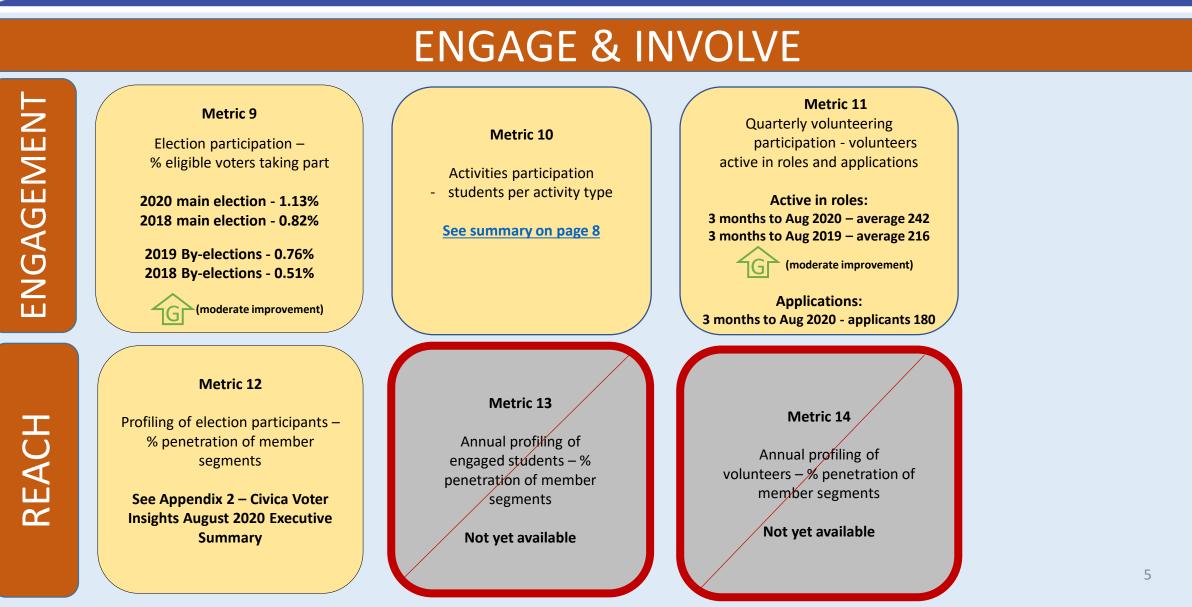
Movement	For metrics where we are seeking to achieve upward tracking	For metrics where we are seeking to achieve downward tracking
Significant improvement	G Solid green upward arrow	Solid green downward arrow
Moderate improvement	Hollow green upward arrow	Hollow green downward arrow
No change	Amber horizontal 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.

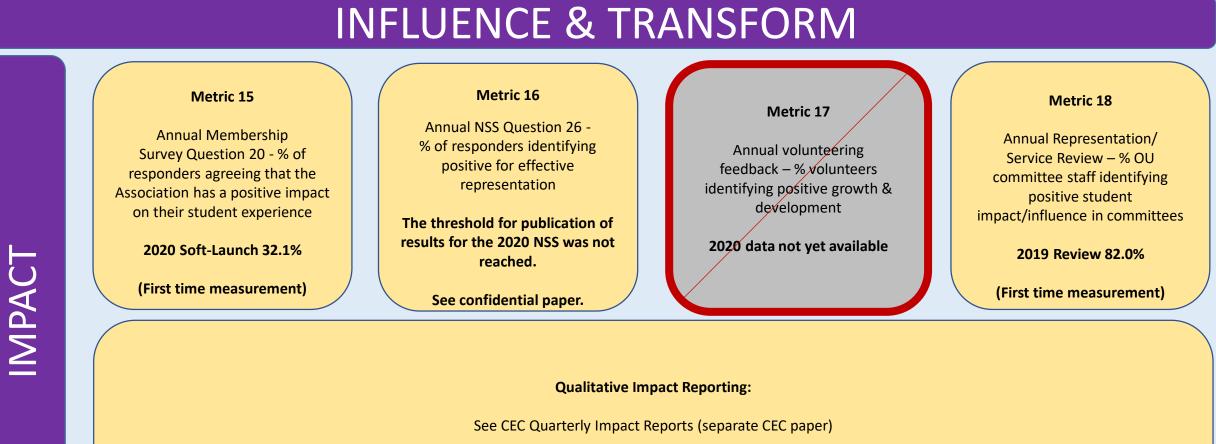
#### Quarterly Update Report – September 2020



#### Quarterly Update Report – September 2020



#### Quarterly Update Report – September 2020



See Conference Evaluation Report (separate CEC paper)

Students



Quarterly Update Report – September 2020

# **ORGANISATIONAL CULTURE**

Metric 20

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

2019 survey: Integrity - 81.68% Equality & Inclusivity --85.39% Openness - 76.38% Collaboration - 80.64%

(First time measurement)

#### Quarterly Update Report – September 2020

Service/Resource (SR) Or Activity (A)	Description	Measurement Basis	First Time Measurements Sept 2020
SR (Metric 5)	Societies	As at reporting date	22
SR (Metric 5)	Societies members	As at reporting date	6867
SR (Metric 5)	Shop orders	In quarter prior to reporting date	704
SR (Metric 5)	Shop average order value	In quarter prior to reporting date	£32.56
SR (Metric 5)	New newsletter sign-ups	In quarter prior to reporting date	260
SR (Metric 5)	Newsletter open rates	Average for quarter prior to reporting date	25.50%
SR (Metric 5)	Newsletter click through rates	Average for quarter prior to reporting date	3.30%
SR (Metric 5)	TOTUM cards	For 12 months prior to reporting date	14,873
SR (Metric 5)	Peer Support Users	For 12 months prior to reporting date	125
SR (Metric 5)	Library Support Requests	For 12 months prior to reporting date	63
A (Metric 10)	DSG members	As at reporting date	397
A (Metric 10)	PLEXUS members	As at reporting date	590
A (Metric 10)	BAME FB members	As at reporting date	57
A (Metric 10)	Clubs	As at reporting date	56
A (Metric 10)	Club members	As at reporting date	9784

This area of the KPI reporting is still under development.

This list gives an initial sample of the types of figures that will be presented and where movements will be tracked in future reports.

This list will be expanded in future reports as more data becomes available and verified, to include areas such as:

- Event attendance (e.g. meet-ups, drop-ins,)
- Media views (e.g. website pages, videos)
- OUSET applications & grants
- Research activities (e.g. consultations, surveys)



# SECTION B: STRATEGY PROJECTS UPDATES

# Strategy Projects

#### Quarterly Update Report – September 2020

Project Number	Project Scope / Description	Initiation Status G = Completed A = In progress R = Not yet started	Project Status (Active Projects Only)	Project Updates (Active Projects Only)
Project 1	<ul> <li>Overall Scope: Improve our understanding of student needs, expectations and motivations. Conduct a regular review of our services, engagement activities and comms channels to identify improvement opportunities and increase participation.</li> <li>Workstream 1A: Conduct membership research and analysis Develop and launch the Annual Membership Survey to gain membership feedback on: our activities &amp; services,; member expectations; study and volunteering motivations; awareness levels and comms preferences; engagement interests; Association culture. 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.</li> <li>Workstream 1B: Service &amp; Activity Reviews</li> <li>Create the process for an annual service and activity review &amp; facilitate the first such review before transitioning the process into BAU. The annual reviews (in conjunction with strategic KPI tracking data) will enable the organisation to assess, on an on-going basis, the effectiveness and impact of all Association services and activities along with identifying new service opportunities. This will enable infirmed decision-making on resource allocation/prioritisation.</li> </ul>	A	G	<ul> <li>Workstream 1A:</li> <li>The Annual Membership Survey was developed and soft-launched to a representative sample of 30,000 students n February 2020 and achieved a response rate of 0.98% (vs target of 3%). The result was disappointing but there are a number of contributory factors: the soft-launch sample approach meant that we were unable to promote the survey as widely and fully as we would have wanted to due to parallel running with NSS and elections and the reminder email had to be cancelled due to COVID-19 comms priorities. The full roll-out will take place in November 2020 to coincide Student Voice Week. For the roll-out in November we will still be targeting a 3% response rate and expect to be able to promote more fully along with using a higher value incentive. Top-line results were shared with the CEC in July.</li> <li>There is some inherent risk in the roll-out of the survey in November due to our dependency on the OU for data provision and email scheduling/release and potential clashes with other student communications, which we are seeking to mitigate through OU negotiation contacts. The project team has also flagged the substantial resource requirement for analysing the response data from the roll-out and are seeking to mitigate this through exploring analytical software/tools.</li> <li>Workstream 1B :</li> <li>The project team are proposing that the first full annual service review be delayed until after the response analysis for the roll-out is available (c April 2021) when a larger evidence base will be available along with the first two sets of KPI tracking data. This will allow for a more thorough review to be conducted and for any recommendations made to be based on a more comprehensive evidence base.</li> <li>The project team are seeking CEC approval for this proposal.</li> </ul>

# Strategy Projects

#### Quarterly Update Report – September 2020

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Project 2	<ul> <li>Overall Scope:</li> <li>Commission a study into the feasibility of providing individual representation for students.</li> <li>Phase 1:</li> <li>Conduct research, analysis and discovery activities to identify needs, assess options and develop recommendations and funding requirements. Prepare a full business case for presentation to OU PVC-Students.</li> <li>Phase 2 (subject to funding provision):</li> <li>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.</li> </ul>	A	A	<ul> <li>Phase 1:</li> <li>The business case was supplied to PVC-S on 20/7/20 and a formal meeting took place with PVC-S Office members on 4/8/20, at which we were advised that the funding would be approved. We were asked to seek a statement of support from the OU Casework Office, to enhance the 'benefits to the OU' section with additional detail and to extend the pilot programme to run for an 18 month period. We are currently working on developing a version 2 of the business case, alongside responding to the OU on specific queries in relation to the OU benefits.</li> <li>Phase 2:</li> <li>A draft implementation plan for the pilot programme has been developed, based on a provisional 'go live' date for the service of 1/2/2021. This has a critical path dependency on having final funding approval by the end of September to be able to commence the staff recruitment process.</li> <li>Amber status due to the additional work requirements to secure the funding and a knock-on risk to the provisional 'go live' date.</li> </ul>
Project 3	Implement a student support resource library. Explore opportunities to expand our student support services through partnerships with external service providers, support agencies and societies.	R		Project not yet started



#### Quarterly Update Report – September 2020

Project Number	Project Scope / Description	Initiation Status G = Completed A = In progress R = Not yet started	Project Status (Active Projects Only)	Project Updates (Active Projects Only)
Project 4	Create meaningful on-going connections and communications with OU students at all key stages in their student journey.	R		Project not yet started
Project 5	Develop and publish a student engagement value statement in order to actively promote the benefits of engaging in the wider student community and to encourage greater student involvement in Association activities and events.	R		Project not yet started
Project 6	Work with OU principal stakeholders to encourage the OU to do more in promoting, sign-posting and supporting the work of the Association.	R		Project not yet started
Project 7	Create new communities where students can benefit from social interaction and informal mutual support. Create more opportunities for students to support other students through volunteering roles that are effective and adaptable to student	R		Project not yet started

# Strategy Projects

# Quarterly Update Report – September 2020

Project Number	Project Scope / Description	Initiation Status G = Completed A = In progress R = Not yet started	Project Status (Active Projects Only)	Project Updates (Active Projects Only)
Project 8	<ul> <li>Overall scope:</li> <li>Complete an analysis of the Association's internal and external stakeholders in order to develop and implement a stakeholder engagement plan.</li> <li>Workstream 8A:</li> <li>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.</li> <li>Workstream 8B:</li> <li>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.</li> </ul>	A	A	<ul> <li>Workstream 8A – Stakeholder Mapping Exercise:</li> <li>As a result of the shift to WFH, an alternative approach to this workstream was taken whereby rather than create a full project team, the project was actioned by a single CEC &amp; staff member with task-based contributions from different areas of the organisation. Lists of external and OU stakeholders have been compiled and are currently being mapped. The list of internal stakeholders is currently being complied ready for mapping. All stakeholder maps are expected to be completed by the end of September. This is later than originally planned but has been impacted by resource availability due to staff workloads during 2020.</li> <li>Workstream 8B – Stakeholder Engagement Plan:</li> <li>For this workstream a full project team will be created in order to allow full contributions from the student and staff teams. It is recognised that this work is a critical 'building block' to underpin the commencement of other strategy projects and the organisation-wide comms strategy. The project team are seeking CEC expressions of interest to join this project team and also CEC sponsorship for this phase.</li> <li>The project team have also recognised that stakeholder maps and engagement plans are not static and it will be important to maintain accuracy/currency of the data. The scope of this phase is therefore being expanded to include the development of a BAU process for ongoing review and update of stakeholder data.</li> <li>Status is amber due to the original delays and a risk in relation to resource availability for workstream 8B.</li> </ul>

# Strategy Projects

#### Quarterly Update Report – September 2020

Project Number	Project Scope / Description	Initiation Status G = Completed A = In progress R = Not yet started	Project Status (Active Projects Only)	Project Updates (Active Projects Only)
Project 9	<ul> <li>Overall Scope: A series of three related projects aimed at increasing and improving student voice in academic representation and OU ways of working.</li> <li>Workstream 9A: 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.</li> <li>Workstream 9B: Support the work of the OU in developing a student voice Community of Practice to improve the effectiveness of student voice in OU activities through information exchange, discussion and the establishment of best practice principles.</li> <li>Workstream 9C: Launch the Association's Student Engagement Standard and work with key OU stakeholders to promote the Standard and embed student engagement in OU activities and projects.</li> </ul>	A	A	<ul> <li>Workstream 9A:</li> <li>New OU/Association governance group have been meeting monthly and are establishing their ToR. This group will begin work on the code of practice alongside work to identify and rectify contradictory statements within the code of conduct for committee members and the relationship agreement, which is being updated by the OU Student Voice Team as part of this work. It is anticipated that despite a delay in the start of this project, a new schedule has been established and we are on track to complete in the desired timescales. (first draft end of Nov 2020).</li> <li>There appears to be an appetite from the OU to work together to get this right and this work is supported by the Academic Governance review the OU completed internally.</li> <li>Workstreams 9B &amp; 9C:</li> <li>Previous work carried out in these two areas prior to the creation of the strategy project is being absorbed into these workstreams and project plans &amp; timelines are in the process of being established alongside Representation &amp; Volunteering Team priorities and new team members being recruited/inducted.</li> <li>Status is amber due to the resourcing factors around the establishment (recruitment and induction) of the new Representation &amp; Volunteering Team.</li> </ul>
Project 10	Establish a process for authorising, funding, supporting and running campaigns. Produce a manifesto for life-long learning.	R		Project not yet started

# OUD Students Association

# SECTION C: BUSINESS PLANS UPDATES

# **Business Plans**

#### Quarterly Update Report – September 2020

Business Area	Achievements & Deliverables	Issues & Risks
Chief Executive	One of the best achievements of the period has been the continued delivery and performance by all Association staff, representatives, Trustees and volunteers working from home during the current situation. It is a pleasure to lead such a resilient, resourceful, dedicated and caring staff team who have continued to look after each other and our student representatives and volunteers and continued to deliver the work they are responsible for and contributing towards. Otherwise, the business plan is on course for delivery without any major highlights to report at this early stage.	The current situation with the pandemic is a huge continuing risk to the delivery of the business plan and the activities contained within mine and all others listed here and it remains under watch and with hard work being put into trying to make it work despite the situation for which I think we've been very successful to date. There is no room for complacency through the autumn and winter months though. In terms of my own business plan, the only further major risk or change worth noting here is that my role as our representative on the University's Strategic Change Board looks to be coming to an end as the University moves away from its current change management and project management approach. We are awaiting formal confirmation of what will come next, but it does pose risks for the Association in the future as it appears unlikely that the future change management structure will have seats at the table for the representative parts of the University community including ourselves.
Deputy Chief Executive (Finance & Resources) (F&R)	Significant progress has been made with the documenting of our current financial procedures in the light of a move to remote working and the likelihood of increased workplace flexibility going forward, to ensure controls are sufficiently robust but workable. We begin 2020-21 with a newly constructed database that is aligned to the regulatory reporting framework, the Charities SORP, with a more flexible chart of accounts with the aim of better supporting our impact reporting objectives. Driven by the Covid-19 pandemic, there has been a particular focus on health, safety and wellbeing of our employees, equipping everyone to work safely from home and making wellbeing a focus of our weekly meetings, as well as providing opportunities for staff to come together/communicate with each other socially. August saw the completion of the Data Protection Officer's (DPO) pre-contract audit work. The DPO has reported that we are meeting, and in some areas, exceeding the statutory requirements. From the DPO's report, the GDPR Group will now create a roadmap to guide our priorities for developing further our compliance.	Workload associated with managing the accounting function of 3 entities together with a wider strategic focus and line management responsibilities represents a risk to the delivery of DCE(F&R) objectives as well as the Finance and Resources objectives. This has been further impacted by reduced working hours and staff absences. The change in the subvention process this year presents a risk to continued growth funding. Progression of strategic projects will therefore require engagement with the OU's business case process as well as careful planning of the core grant allocation and seeking other sources of funding.

# **Business Plans**

# Quarterly Update Report – September 2020

Business Area	Achievements & Deliverables	Issues & Risks
Deputy Chief Executive (Staff & Student Engagement) (S&SE)	The Culture Change Steering Group (SG) held its first meeting with the refreshed membership in mid-August to agree revised Terms of Reference, and to discuss objectives, priority projects and early actions. An updated project scope for the Invitation to Tender for the External Governance Review has been sent to Trustees for approval. The project will be progressed by agreeing a recruitment panel and timetable for the tender process. The SG also established the key projects to progress the 'One Team' initiative. With Organisational Culture now identified within our strategy as a key enabler, the series of Culture development projects have been defined and incorporated into the strategic projects portfolio. It was agreed that early 'One Team' work would include external training for Central Executive Committee (CEC) members, Board of Trustees (BoT) members and appropriate staff. The President and the DCE (S&SE) will be making contact with service providers to talk further about what this training might include together with costs. It was agreed that Central Committee Reps (CCRs), as an important team of volunteers central to the Association's strategic aims, should be included in some 'One Team' work in the very near future.	Due to the requirement to update the scope for the External Governance Review, this has led to a slight delay in the initiation of the tender process. This may lead to a slight delay in the availability of review recommendations (originally timetabled for January 2021). The potential need for external input for the 'One Team initiative could incur cost that has not been planned for.
Community	Planning for Freshers Autumn 2020 is well underway with the development of an exciting programme. With numbers of registered students up on last year, we are looking forward to welcoming a new cohort of students to the student community. A 're-freshers' programme is in the early stages of planning looking at re-engaging students mid to late November – this should have a positive impact on engagement. The Community Team dashboard has been refreshed in order to ensure our data is robust when reporting on strategic Key Performance Indicators (KPIs). Meet-Up, Society and Club Volunteers have been trained to support the shift towards online events and a new Online Host role has been devised and recruited with the Volunteering Team.	The ongoing COVID-19 situation continues to impact face to face events, although in many cases students have been happy to move their events online. Due to the continuation of remote working for staff, we will be unable to send Freshers Freebies, which may impact our levels of student engagement. The Community Team have experienced some recent staffing changes which has impacted on work but this should improve as we approach 2021.
Executive Support & Staff Welfare	Over 30 induction meetings for the President to meet with key members of the OU have been arranged and are underway. The Staff Handbook project has moved forward with draft versions going to the Staff Management Team followed by a staff consultation that ran from 12 August – 4 September. One new staff member has been recruited and inducted with another new starter joining us at the end of September. Recruitment is underway for a Volunteering and Representation Officer.	The COVID-19 restrictions of staff now working from home until at least January 2021 has created the additional challenge of ensuring staff wellbeing while working remotely, especially as we approach the winter months. More consideration and thought will be required to ensure staff feel connected, happy and positive while working through this time. Ensuring that new staff members who are recruited and inducted entirely online are fully briefed on their roles and are able to get to the know the rest of the staff team and student representatives is also critical.

# **Business Plans**

#### Quarterly Update Report – September 2020

Business Area	Achievements & Deliverables	Issues & Risks
Volunteering & Representation	We have merged the former Volunteering Team and former Representation Team into a single team and created a new team structure and roles/remits. The team have been successfully continuing to recruit volunteers in the last quarter, recruiting and appointing CCRs with the Appointments Committee, recruiting and training Library Study Volunteers, Peer Supporters, Online meet up hosts and online session hosts as well as developing and advertising for Student Experience Links. We have seen an increased interest from younger students, and those who are volunteering from further afar, and we believe this is due to the online nature of many of these roles. We have also worked to support VP Representation to set up a monthly student voice meeting and developed the induction weekend training timetable for all student reps.	There have been challenges from working at a reduced capacity, with two vacancies in the team. One appointment has been made and a further role currently under recruitment. Working from home has provided a few challenges but the team has done well in adapting to new ways of working to remain effective and to be able to continue to support students.
Finance & Resources	In the approach to year end, alongside day to day processing activity, the team has successfully managed to review financial procedures and to design and implement a new accounting structure and database (necessitated by the closure of OUSA Services Ltd and to align with the strategic plan). Budget holders have been provided with a monitoring tool to assist them with keeping track of their spend against budgets. The team have supported the design of spreadsheets and collating of data to feed into the performance management process. These KPIs will also support our work on monitoring the performance of the trading activity within the charity and will inform our approach to increasing TOTUM volumes. All filings with Companies House and the Charity Commission are up to date.	The move to remote working for all, due to the Coivd-19 pandemic, posed a significant threat to maintenance of adequate internal controls. Processes were reviewed as a priority and methods for authorisation and filing of audit evidence adapted in response to changed ways of working. Following the completion of the audit process, we will evaluate how the controls are working and make further changes as appropriate. Month end processes can often be delayed due to difficulty obtaining necessary information in a timely way, creating additional pressure in CEC/BoT reporting periods.
Strategy & Research	Strategy – the primary focus has been on establishing all of the strategy performance management elements. Work has been completed to map and roll-out performance management processes and develop templates for performance tracking and reporting. Prototype reports were approved by the CEC and BoT in July. A KPIs working group and the Strategic Projects Assurance Group have been established and the first quarterly reviews of strategic projects and business plans have been completed. Strategy induction has been conducted for new CEC and BoT members and for new and returning staff members. Research – a number of significant research projects have been completed during the period including conference evaluation and the evidence base analysis to support the individual representation business case. Research priorities for the 2020-21 academic year have been established as EDI and Community . Planning is underway for consultation activities during Black History Month (Oct) and Student Voice Week (Nov).	Strategy - currently only four strategic projects are in progress and there are further projects that will need to be initiated to maintain momentum on strategy implementation. Current workloads across both the staff team and the CEC will need to be considered and priorities determined. Research – the resource level in the team is currently temporarily reduced and this has had an impact on the completion of one research project (the full analysis of the Annual Membership Survey which will now be delayed by c 2-3 weeks).



# Quarterly Update Report – September 2020

Business Area	Achievements & Deliverables	Issues & Risks
Digital Comms	Under challenging circumstances and with tight timings, the team pulled together to help deliver a high- quality online 2020 Association Conference using some new tools, never previously used, to great effect. We're currently consulting with a range of stakeholders as part of the website provider project and receiving external advice from the Charity IT Association which is helping us refine our approach to reviewing potential future website providers. The last six months have seen increases in activity on The Hoot and some great results in social media interactions (eg, one Uni Challenge Tweet generated 3,360 engagements). The team's monthly analytics reports are providing a valuable tool for reflecting on the effectiveness of our social media presence and of the output on oustudents.com. The introduction of the Senior Digital Comms Officer role has provided increased management capacity in the team and the addition of the new Projects & Media Assistant role has also increased team capacity for planning and implementing project-based work.	As with all teams, working from home with the backdrop of the pandemic has caused some inevitable distraction and delays due to the need to adapt to a new working culture and environment. There are some challenges around capacity given the scale of work required for the website provider project, but options are being explored for potential outsource solutions for some distinct projects (eg accessibility audit for The Hoot). The move to WFH and closure of campus means we have had to push back the timings for our videos project to Spring 2021 as the work was dependent on students visiting campus. As a service-providing team that supports on digi comms work for all business areas and student reps, there is an on-going need to ensure we are managing and prioritising our time and resources carefully.
Support	The Support Team welcomed a new member of staff as well bidding a temporary farewell to a staff member on maternity leave. We have recruited and trained more Peer Supporters and are about to train new Library Support Volunteers ready for the new academic year. We are also heavily involved in meeting with the OU APP (Access & Participation) team discussing their projects and the creation of their task and finish groups. We have also been working closely with the OU's BME Network in creating the Black History Month programme of events. We have collaborated with OU colleagues to deliver a 'My Wellbeing' page on all Faculty sites for students which will include Association resources and sign-posting. We continue to work with the OU's Mental Health Advisors and the MH Working Group to explore new/improved ways to support students. We are prioritising the creation of our Equality Diversity & Inclusion Working Group to start working on the plegdes we made in response to the 'Black Lives Matter' movement.	Our biggest challenges are resourcing for our priorities, and the adjustments to ways of working from being home-based. Peer Support set up is currently a time-consuming process, impacting lead times, so this is an area for consideration. Our Groups have been quieter in recent months, but we are expecting further engagement during Freshers.



#### Quarterly Update Report – September 2020

Business Area	Achievements & Deliverables	Issues & Risks
Policy & Public Affairs	The Wales Volunteer Panel has been established with volunteers recruited and is enthusiastically contributing to a Welsh Government consultation. Monthly meetings have been established with public affairs professionals from the OU in Wales, Scotland and Ireland, which provide a formal but friendly link between the Students Association and the nations offices. A connection has been made with an open university in Canada with a view to creating an international network to share best practice and build a wider distance-learning (DL) student community. There are regular communications with the OU Government and External Affairs Office and plans to work together on forthcoming lobbying and campaigns focused on the UK Government's Comprehensive Spending Review. There have also been several responses to consultations submitted as well as correspondence with All Party Parliamentary Groups and MPs on behalf of OU students.	The idea of a national network for DL students was halted by the Covid19 pandemic. It was hoped in-person events would be able to happen later in the year, but it is now clear that moving forward on this will require a different approach. Physical political party conferences were cancelled, reducing the opportunity to lobby and influence, but online events may provide opportunities for engagement in other ways.



#### OU Students Association

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