QUARTERLY

STRATEGY PERFORMANCE

REPORT

March 2023

SECTION A:

STRATEGIC KEY PERFORMANCE INDICATORS

(KPIs)

Strategic KPIs

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 have a grey dot and note is provided in the comments box.

Key	
⬆	Increase
⬇	Decrease
➡	No change
⬤	No data available

INFORM & SUPPORT - AWARENESS

Number	Measurement	Measre Freq.	Previous	Current Year	Trend	Comment
1	Annual Membership survey response rate Measurement taken as number of responses compared to total surveys sent KPI displayed as a percentage	Annual	2.14%	2.33%	⬆	Increase in response rate from the previous year.
2	Annual Membership Survey question on awareness Number of students aware of the association	Annual	91.8%	N/A	⚫	Results for 2022 AMS not available. Results expected next quarter.
3	Annual NSS awareness question 26 % of responders selecting "N/A" Students choosing an option of not aware of the Association	Annual	14.30%	18.55%	⬇	Number of responders unaware of association has increased showing decrease in awareness.
4	New visitors to website (rolling 12 month figures) Measurement taken as number of new visitors to the main website	Quarterly	143,361	148,433	⬆	New website visitors have increased for this quarter with a steady growing number of new visitors.
4	New visitors to the Hoot (rolling 12 month figures) Measurement taken as number of new visitors to the main website	Quarterly	20,223	19,064	⬇	New visitors have declined for this quarter. However year on year growth is still healthy.

INFORM & SUPPORT - RELEVANCE

Number	Measurement	Measre Freq.	Previous	Current Year	Trend	Comment
5	Service/resource usage – #students per area	N/A	N/A	N/A	⚫	See summary on pg 6
6	Returning visitors to website (Rolling 12 month) Number of visitors returning website	Quarterly	29, 634	29, 950	🔼	Increase for this quarter. This number removes all visitors that have accessed oustudents.com via an Open University IP address.
6	Returning visitors to the Hoot (Rolling 12 month) Number of visitors returning to the Hoot	Quarterly	2,497	2,230	🔽	Returning visitors to the Hoot has decreased in line with new visitors.
7	Quarterly Social Media Engagement Measurement displayed as a percentage of total impressions	Quarterly	2.3%	1.7%	🔽	This quarter has seen a decrease in engagement levels even though this included the festive period. However engagement levels decreased during this quarter in 2021. Further investigation required.
8	Annual Member Survey Q14/15 Percent of service/resource users who would re-use or recommend each Association services	Quarterly	91%	N/A	⚫	Results for 2022 AMS not available.

INFORM & SUPPORT - RELEVANCE

Service/Resource Description	Measurement Basis	Sept 2022	Dec 2022	Mar 2023	Quarterly Change	Year-on-Year Change
Societies	As at reporting date	17	17	17	No change	Decrease
Societies members	As at reporting date	7,948	7,948	8034	Increase	Increase
Shop orders	In quarter prior to reporting date	314	499	199	Increase	Decrease
Shop average order value	In quarter prior to reporting date	£35.73	£31.52	£40.10	Decrease	Increase
Assoc newsletter new sign-ups	In quarter prior to reporting date	234	452	245	Decrease	Decrease
Assoc newsletter open rates	Average for quarter prior to reporting date	16.9%	29.8%	44%	Increase	Increase
Assoc newsletter click through rates	Average for quarter prior to reporting date	2.9%	4.1%	4%	Decrease	Increase
YouTube Video Views	In quarter prior to reporting date	1,908	1,908	2,750	Decrease	Increase
TOTUM cards	For 12 months prior to reporting date	10,240	9311	9078	Decrease	Decrease
Peer Support Users	For 12 months prior to reporting date	146	137	136	Decrease	Increase
Library Support Requests	For 12 months prior to reporting date	127	112	127	Increase	Increase
OUSET successful applications – number and % of all apps	Most recent presentation/academic year	2021 J/K 52 (91%)	-	-	-	-

ENGAGE & INVOLVE - ENGAGEMENT

Number	Measurement	Measre Freq.	Previous	Current Year	Trend	Comment
9	Election participation Number of eligible voters taking part Measurement displayed as a percentage	Annual	1.13%	1.30%	⬆	Significant increase in election participation.
10	Activities participation students per activity type **See summary on pg 8**	Quarterly	N/A	N/A	●	Online & meet-ups have continued to grow this quarter as well as membership for BAME and DSG.
11	Quarterly volunteering participation Number of volunteers active in roles Year on year tracking	Quarterly	205	297	⬆	
11	Active in roles – Month on month tracking	Quarterly	Sept -193 Oct - 283 Nov - 220	Dec -195 Jan - 191 Feb - 298	⬆	An increase in active role this quarter. As above Mostly due to volunteers at the recent graduations.
11	Applications from students to volunteer	Quarterly	30	12	⬇	Decline in applications from this quarter.

ENGAGE & INVOLVE - ENGAGEMENT

OU Students ASSOCIATION

Activity Description	Measurement Basis	Sept 2022	Dec 2022	Mar 2023	Quarterly Change	Year-on-Year Change
Disabled Students Group members	As at reporting date	888	971	1052	Increase	Increase
OU Pride members	As at reporting date	883	916	604	Decrease	Increase
BAME Group members (excl FaceBook)	As at reporting date	149	159	171	Increase	Increase
Individual representation cases	As at reporting date	-	131	145	Increase-	Increase
Clubs	As at reporting date	56	53	50	Decrease	Decrease
Club members	As at reporting date	12,591	13,486	12,161	Decrease	Increase
Number of online events & meet-ups	In quarter prior to reporting date	54	263	275	Increase	Increase

ENGAGE & INVOLVE - REACH

Number	Measurement	Measre Freq.	Previous	Current Year	Trend	Comment
12	Per election - profiling of election participants	Annual	N/A	N/A	●	No new data available.
13	Annual profiling of engaged students	Annual	N/A	N/A	●	Not new data available.
14	Annual profiling of volunteers	Annual	N/A	N/A	●	Still in progress. No data available.

INFLUENCE & TRANSFORM - IMPACT

Number	Measurement	Measre Freq.	Previous	Current Year	Trend	Comment
15	**Annual Membership Survey Question 28** Number of responders agreeing that the Association has a positive impact on their student experience	Annual	52.6%	N/A	⬤	Results for 2022 AMS not available. Results expected at the end of April 2023.
16	**Annual NSS Question 26** Number of responders agreeing that the Association effectively represents students' academic interests	Annual	43.40%	42.34%	🔻	Slight decrease showing for last years NSS. Further analysis is currently being undertaken.
17	Annual volunteering feedback – % volunteers identifying positive growth & development	Annual	N/A	N/A	⬤	The annual feedback survey is under development but has not yet been introduced.
18	Biennial Representation/Service Review – % OU committee staff identifying positive student impact/influence in committees	Annual	82.00%	N/A	⬤	No new data available yet
19	Supplemented with qualitative/quantitative impact reporting, e.g. Quarterly SLT Impact reports, Annual Student Voice Impact Report, Annual Policy & Public Affairs Impact Report, Annual Trustees Report, Annual Report to Council, Volunteering Case Studies	Quarterly	N/A	N/A	N/A	Student Leadership Report

ORGANISATIONAL CULTURE – MAINTAINING AN ENABLING ORGANISATIONAL CULTURE

Number	Measurement	Measre Freq.	Previous	Current Year	Trend	Comment
20	Annual Membership survey response rate Measurement taken as number of responses compared to total surveys sent KPI displayed as a percentage	Annual	2.14%	N/A	●	Results for 2022 AMS not available. Results available for the next strategic report.

SECTION B:

STRATEGY PROJECTS UPDATES

SECTION B1:

COMPLETED PROJECTS

Project Number	Project Scope / Description	Project Final Update
Project 1A	**Conduct membership research and analysis**. **Workstream 1A:** 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.	**Workstream 1A:** The AMS was piloted and then fully launched during 2020. It will be repeated in Autumn each year. This work has now been transitioned into Business-as-Usual activities and sits within the Strategy & Insights Business plan for delivery and reporting for the 2021-22 AY and on-going.
Project 2	**Individual Representation.** **Phase 1:** Identify needs, assess options and develop recommendations and funding requirements. Prepare a full business case for presentation to OU PVC-Students to seek OU funding. **Phase 2 (subject to funding provision):** 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.	**Phase 1:** A feasibility assessment was carried out during 2020 and a business case for funding was presented to the OU. Funding was agreed for a 15 month pilot programme, commencing at the start of the 2021-22 AY. **Phase 2:** The pilot programme was launched in August 2021 and will run until October 2022. A funding request has been submitted to the OU for continuation of this service beyond October 2022

Project Number	Project Scope / Description	Project Final Update
Project 4	**Scope of work**: 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. **Project Required Outcome:** 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.	This work was completed during June 2021 and delivered comprehensive engagement and comms recommendations for six key stages in the student journey: pre-study; initial engagement; learning; end of module; results; and after study. These recommendations will be incorporated into future marcomms plans, commencing with the 2021-22 marcomms plan (Strategy Project #15).
Project 8	**Stakeholder mapping & analysis:** **Workstream 8A:** Stakeholder mapping exercise – identify all internal and external stakeholder groups, develop an understanding of the importance, contributions and potential impacts of each group. **Workstream 8B:** Develop and implement a stakeholder engagement plan. 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.	The stakeholder mapping exercise (Workstream 8A) was completed in the Spring of 2021. Three maps were created: one for the OU Students Association; one for the OU; and one for the external stakeholder environment. On-going maintenance of the stakeholder maps has been passed across into Business-as-Usual activities. The work to complete initial stakeholder engagement plans (Workstream 8B) was completed during early Summer 2021. The implementation of these plans has been consolidated into the development of the 2021-22 marcomms plan (Strategy Project #15).

Project Number	Project Scope / Description	Project Final Update
Project 11	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.	Almond Tree Strategic Consulting were commissioned to carry out the full Governance Review and they delivered their findings report and recommendations to the Association in Spring 2021. The recommendations were accepted by our Board of Trustees (BoT) and a draft implementation plan was produced. A number of student consultation activities were carried out and, building on the consultation findings and the report recommendations, a series of proposals were developed. The Board of Trustees accepted these proposals and agreed to call a Conference for 22nd and 23rd January 2022 for members to vote on whether the proposed changes should go ahead. The proposals were developed into a set of resolutions and were voted on by members at the Conference in January 2022. Unfortunately none of the resolutions met the required 75% approval threshold for implementation.
Project 14	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.	The Equalities Action Plan was completed in Quarter 1, 2021. The requirements of the plan are being taken forward by the EDI Working Group under Business-as-Usual processes as part of a broad scope of work to advance our EDI agenda. This will also include the development of an EDI sub-strategy. The Working Group delivers quarterly updates on progress to the CEC and the BoT.

Project Number	Project Scope / Description	Project Final Update
Project 12 & 13	**Project 12** Identify a model of 'One Team' working and produce a 'protocol' for student representatives and staff members identifying clear expectations. Communicate a 'One Team' message and intent, devising a 'One Team' action plan and designing/leading 'One Team' sessions and activities. **Project 13** Devise an agenda that highlights, encourages and celebrates our stated values.	This project will now be incorporated through staff links, behaviour policy and through the strategy in EDI. This strategy project is now closed. Continued promotion of our values will now be incorporated into business-as-usual activities within business plans and through the implementation of the new EDI sub-strategy and this strategy project is now completed.

Project Number	Project Scope / Description	Project Final Update
Project 15, additionally incorporating Project 5 and Project 6	**Overall Scope: Develop Comms Strategy and Marcomms Plan.** **Part 1: Develop Association Communications Strategy** in same format as other enabling strategies (Volunteering & Research) incorporating aims (linked to strategic aims), objectives and measures of success. **Part 2: Develop Marcomms Planning Tool** 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. **Part 3: Develop Association Marcomms Plan for 2021-22 AY** with clearly identified actions, responsibilities/accountabilities and monitoring/evaluation mechanisms. This project incorporates the two further strategy projects that were initially separately scoped: **Project #5** (the development of a Student Engagement Value Statement) **Project #6** (working with OU principal stakeholders to promote, sign-post and support the Association.)	**Part 1:** The Communications Strategy was completed in July 2021 and runs through to the end of the 2022-23 academic year. **Part 2:** The Marcomms planning tool was completed in October 2021 and will be regularly maintained vis business-as-usual processes. **Part 3:** The Marcomms Plan for 2021-22 was completed in November 2021 and is now operational. The development of an annual Marcomms plan will now form part of annual business-as-usual planning processes. **Project 5** The engagement value statement was completed during March 2022 and will be published via the 'Get Involved' section of the website. **Project 6** Requirements for working with OU stakeholders to help to promote, sign-post and support the work of the Association have been incorporated into the 2021-22 Marcomms Plan.

Project Number	Project Status	Project Scope / Description	Project Update
Project 1B	GREEN	**Overall Scope:** Improve our understanding of student needs, expectations and motivations and conduct a regular review of our services, engagement activities and communications. **Workstream 1B: Service & Activity Reviews**. 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 infirmed decision-making on resource allocation/prioritisation.	**Workstream 1B:** With the new strategy, new team and some services being reviewed and changed, this project needs to be refocussed and can be part of the new strategy development work. The project is closed. **Risks and Interdependencies:** Large projects such as Elections, 50th planning and Freshers will always impact staff capacity, the planning had taken this into consideration. The roles of CEC Lead and Staff Team Lead for this project will both need to be reassigned due to the change in CEC and the appointment of the Director of Membership Services to the role of Chief Executive. .

SECTION B2:

PROJECTS IN PROGRESS

Project Number	Project Status	Project Scope / Description	Project Update
Project 7A	GREEN	**Workstream 7A – WORK IN PROGRESS:** Create new communities where students can benefit from social interaction and informal mutual support. **Workstream 7B: - WORK NOT YET STARTED** Create more opportunities for students to support other students though volunteering roles that are effective and adaptable to student needs.	**Workstream 7A** was initiated in March 2021. **Completed:** Key requirements for platform established from Test and Learn project and other sources. Decision to pursue our own pilot supported by CEC. Project Team completed full options analysis including researching potential providers, attending demos with several providers, and receiving proposals from providers. Options analysis identified Aluminate as the most appropriate platform. Business Case for year long pilot approved by BoT. Advice sought from Head of Finance and Resources, StoneKing and DPO on contractual terms. Aluminate configuration completed. Significant additional work has been undertaken in relation to verification of Single Sign On (SSO) for OU IT, which has now been approved. Terms and Conditions for platform have been drafted by StoneKing and returned with amends. **Key actions and next steps:** Finalise SSO integration with OU IT. Complete Aluminati training. Assign tasks to project team. Adjust timescale sand scope for refocus of platform **Risks and Interdependencies:** Reliant on OU IT for the technical work to integrate single sign on with Aluminate. This has already significantly impacted project timeline. Need to stay in close contact with the DSE/MyOU team as there is still a significant interrelationship between the aims of the projects. Promotion of the platform by the Association and the OU will be critical for the pilot's success.

SECTION B3:

PROJECTS CLOSED

Project Number	Project Scope / Description	Project Final Update
Project 10B	**Scope of work**: Produce a manifesto for life-long learning.	Work will be reassigned and continued in to Business as usual. This work will no longer be treated as a strategy project and will be continued over next few months.
Project 9	**Scope of work:** 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.	The academic representation code of practice draft was approved by the Student voice steering group where it was taken for review by members of this group. This marks the completion of one of the objectives of project 9. The student engagement standard had been destined for launch. Plans on how this will be carried out will be looked in to over the next few months. This work will no longer be treated as a strategy project and continued over the next few months.

SECTION B4:

PROJECTS NOT YET STARTED

Project Number	Project Scope / Description	Notes
Project 3	**Scope:** **Workstream A:** Implement a student support resource library. **Workstream B:** Explore opportunities to expand our student support services through partnerships with external service providers, support agencies and societies.	**Workstream A:** Within Business-as-Usual activities two mini-hubs have been created - one for EDI resources and one for individual representation resources – and scoping work has been carried out on the development of a broader Association-wide resources hub for use by students, volunteers and staff. It is anticipated that the development of a full resources library/hub will be considered as a development opportunity for the new website. **Workstream B:** It is likely that any requirements for this work to be conducted will be determined by the outcomes of the annual service review (Project 1B).

SECTION C:

BUSINESS PLANS UPDATES

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- Permanent appointment of Chair of Trustees and CEO offer stability as we begin strategy work.
- Negotiation around subvention proposals for the next 3 years has begun.
- Recruitment of permanent Associate Director: Services and Projects is underway. Trustees approved an amended Senior team structure which is currently being developed fully ready to implement.
- Conversations about 2024 Conference are starting.

Issues & Risks

- Staffing capacity is currently reduced due to absence and staff moving on.
- Staff will be focusing on organisational priorities and it will be important that staff teams and SLT members work together to agree priorities.
- Some work may need to stop or pause to limit burnout and maintain quality of our priority areas/services.

Director of Membership Services

This report will provide a summary of the Business plan update

Achievements & Deliverables

- Environmental and Sustainability Working Group have agreed and launched action plan. New sub-teams are working on strands of the plan.
- Board of Trustees approved funding for Individual Representation Service for further year.
- Accessibility Standards Working Group formed to look at operational approach to accessibility.

Issues & Risks

- Reduction in resource across teams will require re-prioritisation of work.
- Increase in number of vacant posts and post holders taking a break from SLT.
- One new ongoing complaint (relating to forums) in last quarter.
- Scope of Student Chat Platform refocussed, still awaiting single-sign on.

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- New 'Our Priorities' areas of the website created to highlight achievements within the SLT priority areas.

Issues & Risks

- Absence of Senior Policy Advisor creating a slowdown of work in the P&PA area.

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- Delivery of Jan/Feb Freshers (evaluation currently underway for presentation at April SLT)
- Writing and approval of new Society Committee Terms of Reference
- Participation on 4 face to face events
- Recruitment of new University Challenge team
- Work with Grad School on post-grad induction session and University Mental Health Day

Issues & Risks

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- Leveraging OU relationship:
- Boosting visitors to The Hoot through link through from all-student newsletter (1,227 visits)
- Accessibility audit of DSG webpages on oustudents.com established
- Relationship with InsideTrack re-established (2 stories for OU staff to read about the Association in March)
- Cost-saving filming opportunity identified
- New SLT Issues page almost ready for launch
- SLT Filming/Comms session well-attended & SLT Twitter handles used in Exec Support Twitter takeover
- Team facilitated meeting between MSL & Vol and Rep
- Work underway on campaign planning best practice to share with staff

Issues & Risks

- Reduced capacity causing strain on staff
- Paid verification being announced for Facebook & Instagram

EDI & Student Welfare

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- Library Study Volunteer Requests hit 400
- Groups Review Workshop very productive, implementation started already where relevant to Group Elections.
- Committee Elections for BAME and OU Pride have begun.
- Individual Rep has a promotional action plan and has started to record Faculty data as well as looking into standardising 'result' info as part of reporting.
- Looking into partnering with Academic Services on an initiative which sees Ind Rep 'refer' students who might need further support.
- Awareness Days – Holocaust Day of Remembrance, Book Giving Day and Uni Mental Health Day.

Issues & Risks

- Though we are hopeful, short turn around for the elections and lack of engagement in the Groups may mean that engagement is low.
- DSG Committee has had 3 resignations this month, two of which were recently co-opted.

Exec Support & Staff Welfare

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- BoT Meeting held 31 January 2023 which included training with Stone King.
- First in person SLT meeting held at Holiday Inn over the weekend of the 10-12 February 2023.
- Student Issues Reporting Tool will be going live on the website this week

Issues & Risks

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- Completed procurement process for replacement finance software that is fully cloud based.
- Supported subvention 2023/24 negotiations with the aim of minimising the funding reduction.
- Reviewed asset register and staff equipment log to bring up to date and ensure the physical location of items is logged.

Issues & Risks

- Agreeing contract with Iplicit taking longer and more work than expected.
- Student consultations, graduations and SRG have all increased the demand for support with arranging travel and accommodation and/or paying advances.
- Incomplete information on PO requisitions adding to workload.

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- We have successfully reviewed all our OU Shop items and restocked all items required for this financial year within budget.
- Cost/prices of all re-stock items were analysed by Head of Ops - a few items were under 50% GPM – so were taken to OUSSWG for discission to be made on suggested increase, suggested alternatives or suggested ends to item lines. All agreements reached and all restocked items now have 50% or greater GPM.
- G7 Platform upgrade completed for OU Shop Gravit-E site. Only awaiting a final meeting with Digi Comms to ensure all Brand Compliant e.c.t The site is now more secure, easier to edit and has a better useability for our student's experience.
- OU Shop business cards used on stalls now updated with QR code to store for student's ease. QR code also included on receipt pads as well as an asset promoting TOTUM cards.

Issues & Risks

- The opting out process continues to raise concerns within the operations team. Since the last report we have worked with the association to clear up the 21 mailing lists, now with around 7 lists left after clear up. We are working with digi comms to find a way to link all the lists into the Opting Out process.

- Regarding the MSL website groups such as DSG – these have been identified as separate to the general opting out process and will be managed by the community team.

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- Responded to APPG on Students consultation on the impact of the cost of living on students.

Issues & Risks

- Senior Policy Advisor currently absent.

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- AMS high level stats produced with further work to be completed by the end of April 2023.
- Consultations planned and focused on input for strategy.
- Strategy group created with representation from trustees, staff and SLT.
- Supporting TEF submission and focus group support and analysis for Groups review

Issues & Risks

- Areas of work has been paused on Business plan due to absences across the team.

Overview

This report will provide a summary of the Business plan update

Achievements & Deliverables

- Completed the investing in volunteers accreditation process and awaiting decision.
- Appointment of a Deputy for the VP Education role.
- The team were able to meet with MSL and Digi comms to share challenges and barriers to volunteer application on the website and other related matters.
- Log volunteer impact page is now live on the website
- Improved online Volunteer handbook is also live.
- 14 volunteer opportunities are now live on the website.

Issues & Risks

- Losing one member of the team will have an impact on capacity.
- Resignation and taking breaks could potentially have an impact on gaps within the roles created as a result.