Candidate brief for the position of Head of Returns, University Secretary’s Office
The Open University
Academic Related £51,630 - £58,089
Full time 37 hours Monday – Friday
Based in Milton Keynes
March 2019
About The Open University

The Open University (OU) is the largest university in the UK by student population and has a significant global reach through a network of alumni in over 150 countries, international partnerships and research. The OU is the only university to receive funding from, and operate in, all four nations of the UK.

The OU was established in 1969 with a unique aim. Our mission was to provide a new style of university education that was truly open to people, places, methods and ideas, to improve lives and enrich communities in the UK and across the world. As we enter our fiftieth year, and with more than two million people who have studied with us, the commitment to our mission is as strong as ever. That’s why we continue to evolve and adapt our teaching methods and technology to support student success in a rapidly changing world.

A unique institution

The OU is unique. A world leader in open access, supported open learning and open educational resources, our distance learning approach sets us apart from other universities. Our commitment to open entry requirements means the OU has an unrivalled reach and influence on today’s society. Our flexible approach supports people of all ages and backgrounds to study and achieve their potential. Through academic research, teaching innovation and partnerships, the OU constantly breaks new ground in the design, content and delivery of supported open learning.

Open, ambitious, innovative and inclusive

We believe anyone, anywhere, can study with The Open University. Around 174,000 students are currently studying with us, and these include:

- Around 24,000 disabled students
- 1,500 students in prison or other secure environments
- Students sponsored by FTSE 100 companies and major public services like the police and the NHS

In excess of 1,000 students on apprenticeship courses.

Some other highlights include:

- An overall satisfaction rate of 90% in the latest National Student Survey.
- A unique partnership with the BBC since 1971 and co-production of approximately 35 prime-time TV and radio series every year. During 2017/18, OU-BBC TV and radio programmes were listened to or viewed 351 million times, including the flagship Blue Planet II series.
- We grew our Massive Open Online Courses, provided through the University’s subsidiary company, FutureLearn Limited, to 20.6 million registrations from 8.2 million learners across the world.
- Free-to-use courses and modules on our OpenLearn in-house platform received 7.8m views in 2017/18.
- Being one of the top three space science centres in the UK.
- Providing free educational resources to teachers and healthcare workers in sub-Saharan Africa and India, reaching over two million people.
- A Business School that is part of the top 1% of global business schools who are triple accredited by the world’s leading management education associations.
Values

Our c. 9,000 staff stay true to a clearly defined set of core values. First, we are inclusive, playing a unique role in society by making higher education open to all and promoting social justice through the development of knowledge and skills. Second, we are innovative, leading the learning revolution, placing innovation at the heart of its teaching and research, continuously seeking new and better ways to inspire and enable learning, and creating world class research and teaching. Third, we are responsive to the needs of individuals, employers and communities, and dedicated to supporting our students’ learning success.

Location

The University has its headquarters on a purpose-built campus of approximately 110 acres in the south-east of Milton Keynes. It also has national headquarters in Edinburgh, Cardiff, Belfast and Dublin, and bases in Manchester and Nottingham.

Leadership and governance

The University is a chartered institution and received its Royal Charter on 23 April 1969. It is an exempt charity registered in England and Wales and regulated on behalf of the Charity Commission by the Office for Students. It is also registered as a charity in Scotland.

The University’s governing body is the Council, which focuses on the University’s overall strategy, finances, property and staff, and is supported by a number of subcommittees, such as Finance and Audit Committees. The Council has the ultimate authority within the OU, but it has to respect the views of the Senate in academic matters. The Senate is the academic authority of the University, responsible for academic strategy, policy, priorities and performance. The Vice-Chancellor is accountable to the Council for maintaining and promoting the efficiency and good order of the University. The University’s Chancellor is Baroness Lane-Fox of Soho and its Pro-Chancellor (who also chairs the Council) is Malcolm Sweeting.

More information on the OU’s leadership and existing structure can be found here.
Mission and Strategy

The Open University’s mission is to be open to people, places, methods and ideas. Our key strategic priority is student success.

Mission

We promote educational opportunity and social justice by providing high-quality university education to all who wish to realise their ambitions and fulfil their potential. Through academic research, pedagogic innovation and collaborative partnership we seek to be a world leader in the design, content and delivery of supported open learning.

Most of our undergraduate courses have no formal entry requirements. We believe that the qualifications our students have when they leave are the only ones that matter. We are committed to promoting equal opportunities for all, and close monitoring makes sure that we live up to our ideals.

Our Annual Reports provide a record of our work, events, projects and financial highlights year by year. More information on the OU’s Mission and Academic Strategy can be found here.

Strategy

Through our scale, reach and our ability to support students to succeed we achieve a positive impact on society and the economy. This includes:

- Supporting our students to successfully progress through and complete their chosen module(s) or qualification
- Delivering a high quality and flexible student experience with high levels of student satisfaction
- Supporting students to achieve positive career and personal development outcomes.

The focus on student success is underpinned by a set of related objectives, which together will achieve our overall vision:

- Delivering excellent teaching and research to enhance our distinctiveness, reputation and, above all, student success
- Enhancing our future growth and sustainability by diversifying our reach and sources of income and managing and challenging our cost base, to ensure our financial sustainability, headroom for re-investment back into the University, and value for our students
- Investing in technology that enables success – both student facing technology and our own internal systems
- Fostering a dynamic and inclusive culture by investing in staff to recognise and maximise their contribution to our success.

More information on the OU’s Strategic Objectives can be found here.
Student Success

Student success is central to everything the OU does. Our degree ceremonies are always the highlight of the university year because they let us wholeheartedly celebrate the success of our students.

This year we celebrated with more than 8,000 graduates at 29 ceremonies in 14 locations. Those 8,000 were joined by over 26,000 guests – supportive family and friends who cheered, clapped, whistled and whooped during each event. And we conferred 34 honorary degrees.

OU students are represented by the OU Students Association. Run by students, for students, it ensures that the student voice is heard. The OU Students Association works with the University to ensure that students are involved as partners in shaping their studies. Although OU students learn at a distance, we work to ensure they all have the opportunity to be involved in giving their views on the curriculum or institutional change and development.

Student Profiles

There is no typical OU student. People of all ages and backgrounds study with us, for all sorts of reasons:

- To update their skills, get a qualification, boost their career, change direction, prove themselves, or keep mentally active.
- 76% of directly registered OU students work full- or part-time during their studies
- 23% of OU UK undergraduates live in the 25% most deprived areas
- 34% of new OU undergraduates are under 25
- We are the largest provider of higher education for people with disabilities:
  - 24,709 students with disabilities studied with us in 2017/18
  - Our open admissions policy helps thousands of people who failed to achieve their potential earlier in life
  - 34% of students had one A level or a lower qualification at entry

Student Stories

The OU’s students have some remarkable personal stories. For example:

Fatema fled from her home country of Bangladesh to Cyprus at 16 without finishing school. Investing all of her time in daily survival, she never had the opportunity to resume her schooling. Upon hearing about The Open University and its open to all policy, she enrolled on a Social Work course.

John grew up in Cardiff and was unable to read or write. He reached his mid-30s having never read a book, and it was later discovered he has severe dyslexia, ADHD, and Meares-Irlen syndrome. Despite these challenges, John graduated with an OU Science Degree at the age of 46.

Read more student stories here.
Finances and Key Statistics

In 2017/18 the OU had 174,898 students (64,914 full time equivalent). Total income was £424m, of which £271m came from tuition fees and education contracts, £101m from funding body grants, and £14m from research grants and contracts. The University receives funding from the Office for Students (OfS) in England, and the funding bodies in Scotland, Wales and Northern Ireland, but its principal financial regulator for all the nations is fulfilled by OfS. The majority of its expenditure is on its staff and the infrastructure to support distance part-time education. The University has a strong balance sheet with substantial reserves. A programme of agreed strategic change driven cost-reduction measures will support delivery of the OU’s financial strategy for financial sustainability. The strength of the reserves has enabled the investment in strategic change to build for our future to be done without recourse to external funding.

Full Annual Reports and Financial Statements can be found [here](#).

Key Statistics
The Open University has spent almost 50 years inspiring learning and creating higher educational opportunities with no barriers to entry. We continue to demonstrate excellence in research and teaching and achieve enormous reach through use of open access educational resources and our partnership with the BBC.

Growing our attractiveness to students
- We increased the number of students studying with us to a level last seen in 2013/14 and improved our student satisfaction score in 2018 National Students Survey.

Gaining External Endorsement of the excellence of our Teaching and Learning.
- We secured continuance of triple accreditation for our MBA, keeping us in the top 1% globally, and we have excelled in all our professional programme reaccreditation and quality assurance assessments.

Extending our reach
- We remain the largest University in the UK and one of the largest in Europe in terms of student numbers. We grew online courses provided through the University’s subsidiary company, FutureLearn Limited, to 20.6 million registrations from 8.4 million learners across the world, and we have established are growing Higher Level Apprenticeships.

Enhancing our multiple media channels
Use of our multiple media channels continues to grow. Total downloads from The Open University iTunes U service reached 72 million, video views of Open University content on YouTube reached 50 million, and there were 7.8 million unique visits to the University’s open educational resource website, OpenLearn. We achieved significant recognition for programmes including Blue Planet II, The Prosecutors, and The NHS at 70.

Extending our global footprint
- We continue to work in partnership with internal development agencies to deliver life-changing educational programmes across three continents.

Building for our future
- We commenced an ambitious and far reaching programme of strategic change to enhance our students’ experience and interaction with the University, and to upgrade and improve our student facing support systems and processes.
University Secretary’s Office

The role holder will be responsible for the Returns team of 5 staff which sits within the University Secretary’s Office (USO).

The Returns team is responsible for the OU’s statutory returns on students and staff to the Higher Education Statistics Agency and the four UK nation funding councils (the Office for Students, the Higher Education Funding Council for Wales (HEFCW), the Scottish Funding Council (SFC) and the Department for the Economy (DfE) in Northern Ireland). The team also provides student number data for inclusion in a range of returns made by other areas of the university.

The team is an active participant in the alpha and beta pilots for the HESA ‘Data Futures’ project, and with preparations for the radically new style student record to be implemented in due course.

The team also provides data support to Research and Academic Strategy for internal and external reporting on the University’s research students.

The team work closely with the Returns systems team in the Chief Information Officer’s (CIO) Portfolio to ensure that statutory reporting requirements are taken into account in the university’s strategic data and technical initiatives and the systems used to compile the data returns.

The wider USO team supports the University Secretary through relationship management (including with the University’s regulators), the management of information rights and compliance, provision of secretariat support, delivery of strategic initiatives and projects, and provision of planning, resourcing and office functions. The University Secretary also has responsibility for the University’s Professional Services Units. As such, USO support enables the University Secretary to ensure effective governance of the University and the efficient management of Professional Services in order to deliver University objectives. The USO works particularly closely and collaboratively with the Vice Chancellor’s Office, and with members of the Vice Chancellor’s Executive and their offices.
The USO is currently configured with the following teams;

- Directorate
- Data Strategy & Governance
- Governance
- Information Rights
- Returns

In addition to the University Secretary’s Office, the University Secretary is responsible for the following Professional Services and related areas:
The Role

Role Summary

The Head of Returns leads the University team responsible for key institutional returns and surveys and gives leadership to the Open University (OU) in the development of best practice in making quantitative statutory returns, working closely with the Returns systems team in the Chief Information Officer’s (CIO) Portfolio. Returns and surveys for which responsibility currently falls within the remit of the Returns Team include the Higher Education Statistics Agency (HESA) Student, Staff, Aggregate Offshore, Provider Profile and Unistats returns, and student number returns made to the four UK funding agencies and the Education and Skills Funding Agency.

The Head of Returns negotiates with HESA and the funding agencies on matters relating to the collection, specification and use of data from returns, including influencing specifications for the returns, to ensure that the University’s published data reflects the University’s true position. The Head of Returns has an influential role in advising staff across the University on how the requirements of HESA and the funding agencies impact on data collection systems, data quality and policies and procedures for student administration and curriculum development.

The Head of Returns provides analysis and reports based on HE sector and OU data for internal planning and decision making, and analysis, advice and guidance to University managers on student numbers for use externally in presenting the University’s position relative to published data on the higher education sector.

The Head of Returns ensures that statutory reporting requirements are taken into account in the University’s strategic data and technical initiatives, e.g. currently the University’s Core Systems Replacement programme and Enterprise Data Hub.

Main duties

Statutory returns
1. Develop and maintain a schedule of returns and surveys and manage their preparation and submission.

2. Develop processes and methods of working for the preparation of returns which deliver returns to external deadlines, meet internal and external standards for the presentation of data and of internal and external audits. The process covers reviewing requirements, identifying data sources, planning and scheduling the development of the return, specifying the method of preparation, managing data quality issues, sign-off, submission and the response to verification and feedback.

3. Ensure that all returns meet the stated requirements to agreed quality standards, including the accuracy and completeness of data.

4. Review and approve the Returns Team’s outputs, assuring the University Secretary and his office that they meet the requirements and highlighting any funding or other implications for University plans.

5. Influence the practice of external agencies and negotiate appropriate arrangements for reporting the University’s activities in relation to their requirements, to ensure that appropriate decisions are made in interpreting requirements in the presentation of OU metrics.

6. Contribute expert knowledge to the preparation of returns based on an understanding of the University’s business, the processes and systems that generate and manage data and the agreed means by which the University’s data is presented in order to meet sector norms.

7. Work with OU’s nation offices, Finance, Government & External Affairs and others to develop and maintain an understanding of grant funding arrangements and to enable regular monitoring of performance against funding objectives.

8. Keep under review the systems and data available for making returns and advise operational data owners of requirements for new data or changes to data collection procedures and on whether data meets the quality standards required for making returns.

9. Manage the process of internal and external audits of the returns made by the team and develop and maintain systems consistent with the recommendations of external and internal auditors.

10. Work closely with the Returns Systems Team in the CIO Portfolio and relevant others on the design of
systems used to extract, transform, analyse and format data used in returns and for internal analysis.

**Advice and Guidance**

11. Provide advice and guidance to staff across the University on the implications for business planning and operational management of the requirements for returning student and related data and on the fundability of students, qualifications and modules.

12. Advise staff on the use of OU data in relation to statutory data, published information on the higher education sector and on the OU in comparison to the sector.

13. Undertake analysis and prepare reports for use by OU staff, drawing on OU and sector data ensuring consistency with data returned and used in official publications.

14. Ensure the accuracy and completeness of data provided for internal analysis.

**Management**

15. Lead the Returns Team so that it provides a high quality, customer-facing service for the University.

16. Manage the resources of the Returns Team, including annual leave arrangements to meet the returns schedule.

17. Act in agreed circumstance on behalf of senior members of the University Secretary’s Office (USO).

18. Contribute to the work of the University Secretary’s Office as a whole.
The Person

**Education, qualifications and training**

**Essential:** Educated to degree level or possess an equivalent qualification and evidence of a qualification demonstrating significant mathematical ability or proven experience.

**Desirable:** A management qualification

**Knowledge, work and other relevant experience**

**Essential:**
1. Proven analytical, planning and problem-solving skills
2. Experience of the manipulation, analysis and presentation of large volumes of numeric data, including experience of proprietary software used in managing and analysing large datasets
3. A broad general understanding of the UK higher education sector and the methods of funding students in its constituent nations
4. Proven ability to lead, manage and develop staff including coaching and mentoring
5. Track record of managing staff and projects to deliver outputs to high standards to meet fixed immovable deadlines
6. Confident and experienced in negotiating with and influencing internal and external customers at all levels

**Desirable:**
1. Knowledge of statutory returns in the UK higher education sector

**Personal abilities and qualities**

**Essential:**
1. Ability to assimilate and interpret complex external requirements for information in the context of the business of the Open University
2. Excellent communication, negotiating and influencing skills including the ability to interpret and explain complex technical information to a non-technical audience to inform effective decision making
3. Ability to develop and manage key internal and external stakeholder relationships effectively
4. Planned and structured: highly organised with first class planning abilities, structured in thinking, and written and spoken communications
5. Excellent IT skills including Microsoft Word, Excel and PowerPoint
6. Innovative, self-reliant and dedicated approach to duties
7. Able to work well under pressure, prioritise your workload and that of your team, and manage demanding deadlines
8. Confident in dealing with ambiguity and scoping work with keen attention to detail
9. Committed to on-going learning and personal development
10. Demonstrates a strong commitment to the principles and practice of equality and diversity
How to Apply

Key dates

Please ensure that your application reaches the University by: 12:00 noon on Friday 26 April 2019.

The final interview process with The Open University is anticipated to take place in Milton Keynes on 13th or 17th of May. You are kindly requested to diarise the dates.

How to apply

To apply, please submit the following documentation quoting reference number 15827:

- A covering letter setting out your interest in the role and details of how you match the required criteria. Please ensure you provide relevant examples as evidence to support your statement on no more than two sides of A4.
- A completed application form.

Referees will not be approached until the final stages and not without prior permission from candidates.

Please email your application quoting reference number 15827 to Resourcing-Hub@open.ac.uk. All applications will receive an automated response.

To submit a hard copy application please post it to arrive before the closing date quoting reference number 15827 to People Services, Walton Hall, Milton Keynes MK7 6AA.

All candidates are also requested to complete an Equal Opportunities Monitoring Form which will be found at the end of the application form. This will assist The Open University in monitoring selection decisions to assess whether equality of opportunity is being achieved.

Information collated from the Equal Opportunities Monitoring forms will not be used as part of the selection process and will be treated as strictly confidential.

Personal data

In line with GDPR, we ask that you do NOT send us any information that can identify children or any of your Sensitive Personal Data (racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, data concerning health or sex life and sexual orientation, genetic and/or biometric data) in your CV and/or application documentation. Following this notice, any inclusion of your Sensitive Personal Data in your CV/application documentation will be understood by us as your express consent to process this information. Please also remember to not mention anyone’s information or details (e.g. referees) who have not previously agreed to their inclusion.

Provisional recruitment timetable

OU interviews: 13th or 17th of May

We are committed to ensuring everyone can access our website and application processes. This includes people with sight loss, hearing, mobility and cognitive impairments. Should you require access to these documents in alternative formats, please contact Resourcing-Hub@open.ac.uk.

Queries

For a confidential conversation about the opportunity, please contact: Judith.Dutton@open.ac.uk