LOCATIONS ANALYSIS PROJECT

The CEC is asked to:

i) receive a presentation from Jim Miller, Director, The OU in Scotland on an update on the Locations Analysis Project.

Jim Miller, Director, The OU in Scotland will be in attendance at the meeting, giving a presentation on the latest update on the Locations Analysis Project.

Jim has provided the below report on the project consultation work undertaken to date.

Ruth Tudor
President
Locations Analysis Project Consultation

BACKGROUND AND PREVIOUS CONSIDERATION

1. The key objective of the Locations Analysis project is to undertake an analysis ‘to determine the optimal configuration of the Open University’s (OU) presence across the UK’.

2. The Locations Analysis Phase 1 report and working documents were presented to VCE and ELT meetings on the 26 January 2015 and 23 February 2015. Following revisions based on comments and suggestions made at the meetings, the report and working documents were shared with Heads of Unit and the Trade Unions on 10 and 11 March 2015 and with the rest of the University on 19 March 2015.

3. The purpose of this paper is to give an update on the activities that have been completed and those that are underway.

CONSULTATION

4. As at 17 June, a number of consultation meetings have been completed including with regions, Nations, Faculties, and units.

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<thead>
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<th>Number involved (as at 17 June)</th>
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<tr>
<td>Region and Nation meetings</td>
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<tr>
<td>Faculty open meetings and/or Faculty Committee meetings</td>
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<tr>
<td>Student Recruitment and Fees &amp; Marketing</td>
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<td>Senate (Open meeting and 2 formal meetings)</td>
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<td>Consultation questions available to all staff</td>
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<td>Student consultative forum</td>
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<td>Imagine workshop</td>
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Meetings were held face-to-face, with remote access using either Stadium or video conferencing. A short presentation was given at most meetings, with an opportunity for staff to ask questions and make comments. All meetings have been attended by the Director, Students and at least one other member of the project team, usually James Miller, Director, OU in Scotland.

Many of the questions and comments are general and include clarification on the Project and process. There are some themes emerging including:

- How to most effectively quantify / articulate the level of knowledge and expertise in the current staff within SSTs and the risk to the organisation of any change which might result in a loss of these staff
- There is a need to present a compelling vision for the way in which the student support model (SSTs) can be supported through any distributed network to deliver the outstanding experience across the value chain
- Any proposals will need to ensure that activities currently organised by staff teams based in regional offices (e.g., tuition and examination venues, AL management and professional development, etc.) will continue to be supported
- The organisational capacity for further change and the need to manage the inherent risks and realise the expected benefits at a time of other change in both the internal (e.g. SST implementation and evaluation) and external environment (e.g. election and potential regionalisation agenda in England)
- A desire to engage further with more detailed options before any recommendations are taken to governance
- How will future options be able to foster a community of learning for students and staff from across all areas of the university
- Concern about what it means for individuals
- The relationship between the project and the current cost saving matters
- A broadly balanced mix of views about whether the project is proceeding too fast or too slow

Questions and comments from the consultation meetings are available on the Project website. Where there are similar or duplicate questions asked in different meetings, these are being added to the Frequently Asked Questions section on the Project website.

In addition to the face-to-face meetings above, a number of other consultation activities have taken place including consultation questions on the Project website, Student Consultative Forum, and an Imagine workshop. Regular briefings continue to be held with Trade Unions.

Consultation questions were made available through the Project website to give an opportunity to all staff to respond. The questions covered the Phase 1 report and working documents, current services and working practices, and how these could be approached in the future. Communications to all staff, including ALs, went out on 14 May, and the consultation questions were available on the website until 15 June. There were 194 completed responses, and the survey page had been visited by 1000 people at 12 June.
The Student Consultative Forum were invited to give their views on what the Project should take into account regarding the distributed network and student experience. The consultation began on 20 May and finished on 3 June. There were 88 posts by 22 individuals. Responses ranged from those who had no interaction with their regional office to those who had regular interaction and saw value in exploring what further services could be offered by regional offices.

The Project is exploring ways of eliciting innovative ideas about the future. An ‘Imagine’ facilitated workshop was held with a number of Assistant Directors and Associate Deans on 4 June, and a specific question was asked in the consultation questions on the Project website. A technology solution to allow a wider group to put forward ideas and comment on them is being considered.

The Project website continues to be a key part of the consultation and providing Project information. The number of pages viewed on the Project website increased from 427 in February to 1251 in March when the Phase 1 report and working documents were made available. 647 pages were viewed in April, and 2872 in May. It is intended that all consultation responses will be made available on the Project website.

This round of consultation is due to be completed by the end of July.

OPTIONS APPRAISAL

The detailed options appraisal work is being progressed in parallel with the consultation. A working group has been formed with representatives from HR, Finance, Estates, and Business Performance Improvements to look at the available data, identify any data gaps, and advance the appraisal process.

A number of potential future opportunities are being considered as part of the options appraisal:

- Co-location of faculty SSTs into a single host site for each faculty
- Improved facilitation of academic engagement and university business requirements through different number and/or scale of presence
- Reduction in duplication of supporting services
- Reduction in management and other overheads
- Increased utilisation of current vacant space across the campus at MK and the wider distributed network
- Taking full advantage of the agile working policy

Key features have been proposed to be included in any future configuration.

- The co-location of individual faculty SSTs (i.e. under- and postgraduate SST for the same faculty hosted on a single location)
- Provision available for differentiated presence for proven academic and business needs beyond hosting a SST.
- An embedded academic presence across each nation meeting the academic, business and support ambitions in line with the University’s strategic priorities
• Alignment and closer integration of the SRF function with SST responsibilities based on the need for a differentiated offer across the four nations of the UK

• Agility to respond to emerging regionalisation proposals for England and further devolution of powers across Scotland, Wales, and Ireland

There are 4 propositions that are under further consideration.

Option 1 Status Quo with process redesign for operational efficiencies

Option 2 Host faculty SST in each nation capital and Milton Keynes plus 3 centres in England with geographical spread (north, mid, south regions)

Option 3 Host faculty SST in Belfast, Cardiff, and Edinburgh, maybe London, and 3-4 centres in England with geographical spread; reduce current footprint in Milton Keynes, possibly moving functions to distributed locations

Option 4 Host faculty SSTs in 6 centres in England with geographical spread plus Milton Keynes; Belfast, Cardiff, and Edinburgh to continue with dual affiliation and wider engagement activities but not host an SST

The detailed options appraisal will consider a number of qualitative and quantitative data sets to build a business case and recommendations. These include student numbers, demand on SSTs, costs (both transitional and new steady state), space utilisation, skills and experience of existing staff, local labour markets, external environmental, and competitors.

It will also look at each option in light of the Strategic Ambitions articulated in Phase 1, the Design Principles articulated in Phase 1, the fit with other agreed University-wide strategic projects, and the proposition Key Features.

The next steps of the project are to complete this round of consultation and to progress the detailed options appraisal. Further consultation on the options will be undertaken prior to taking recommendations to governance meetings in Autumn.

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