

CONFIDENTIAL

Board of Governors Meeting

10.00 am - 4.00 pm on Thursday, 28 September 2017 in

Agenda

<i>No.</i> 1.	Time	<i>Item</i> Agenda for the day	Pages 3 - 4	Presenter
		Items to discuss		
2.		External environment	5 - 12	DP
3.		Progress of the Corporate Strategy to 2020	13 - 28	РВ
4.		LSBU brand development and portfolio	29 - 54	NL

Date of next meeting 4.00 pm on Thursday, 12 October 2017

Members: Jerry Cope (Chair), David Phoenix, Sodiq Akinbade, Steve Balmont, Shachi Blakemore, Duncan Brown, Julie Chappell, Michael Cutbill, Douglas Denham St Pinnock, Peter Fidler, Carol Hui, Hilary McCallion, Kevin McGrath, Mee Ling Ng, Jenny Owen, Tony Roberts and Suleyman Said

In attendance

Apologies

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Board of Governors and Academic Board joint strategy day

9.45am for 10am to 3.30pm on Thursday 28th September 2017 at 15 Hatfields, Chadwick Court, London, SEI 8DJ

PROGRAMME

Theme: positioning LSBU for 2018-2020

Time 9.45	<i>Topic</i> Tea and coffee (adjacent to conference room)					
10.00	Welcome – start of joint session: Board of Governors and Academic Board	Jerry Cope				
10.05	Joint session: External environment questions / discussion 	David Phoenix All				
11.15	Tea and coffee (adjacent to conference room)					
11.30	Joint session: progress of the corporate strategy to 2020 questions / discussion 	Pat Bailey All				
12.45	Buffet lunch (adjacent to conference room) Members of the Academic Board depart after lunch	All				
13.45	 Session for the Board of Governors: LSBU brand development and portfolio questions / discussion 	Nicole Louis All				
14.45	Tea (adjacent to conference room)	All				
15.00	Conclusions	JC				

15.30 **Close**

Attendance

Board of Governors:	Jerry Cope (Chair), Douglas Denham St Pinnock (Vice-Chair), David Phoenix (Vice Chancellor), Sodiq Akinbade, Shachi Blakemore, Duncan Brown, Julie Chappell, Michael Cutbill, Peter Fidler, Hilary McCallion, Kevin McGrath, Mee Ling Ng, Jenny Owen, Tony Roberts and Suleyman Said
Apologies:	Steve Balmont and Carol Hui
Members of the Executive:	Pat Bailey, Deputy Vice Chancellor Mandy Eddolls, Executive Director of Organisational Development and Human Resources Richard Flatman, Chief Finance Officer Paul Ivey, Pro Vice Chancellor (Research and External Engagement) Nicole Louis, Chief Marketing Officer Ian Mehrtens, Chief Operating Officer James Stevenson, University Secretary & Clerk to the Board of Governors Shân Wareing, Pro Vice Chancellor (Education and Student Experience)
With:	Michael Broadway, Deputy University Secretary Joe Kelly, Governance Officer
Additional members of the Academic Board:	Stephen Barber, Reader and Programme Manager, Business Craig Barker, Dean of Law & Social Science Janet Bohrer, Director of Academic Quality Development Office Patrick Callaghan, Dean of Applied Sciences Kirsteen Coupar, Director of Student Services Charles Egbu, Dean of Built Environment & Architecture Janet Jones, Dean of Arts & Creative Industries Patricia Godwin, SU Vice President (Education) Mike Molan, Pro Vice Chancellor (Enhancement), Dean of Business Shushma Patel, Acting Dean of Engineering Lesley Roberts, Head of Skills for Learning Warren Turner, Dean PVC Health & Social Care
Apologies:	Gurpreet Jagpal, Director of Enterprise

Board Strategy day

Sept 2017

Become what you want to be



Page 5

Corporate Strategy – driving reputational improvement

2018 Guardian Table (does not include latest DLHE or NSS results)

Rank 2018	Change from 2017	Institution	Guardian score/100	Satisfied with course	Satisfied with teaching	Satisfied with feedback	Student to staff ratio	Spend per student/10	Average entry tariff	Value added score/10	Career after 6 months
32	14-	City	67	84.6	86.2	73.4	18	7.4	138.3	5.8	82.6
58	38	West London	59.3	76.7	82.6	72.9	15.6	5.8	118.8	6.4	68.9
70	4	Middlesex	55.9	81.5	81.7	74.9	16.6	6.6	117.2	5.1	71.4
 81	7	Kingston	53.8	79.8	80	71	18.8	6.2	118.3	5.2	64.4
a) 92	15	London South Bank	50.6	81.6	83.9	71.6	17	4.3	105.9	5.7	75.9
Page 102	3	Greenwich	49.7	81.8	83.1	71.6	17.8	3.6	131	5.8	65.3
102	8-	Hertfordshire	47.8	82.9	85.9	70.1	17.6	4.1	118.3	4.2	77.7
တ ₁₀₅	1	St Mary's, Twickenham	46.5	85.2	87	67.9	17.9	3.2	122.1	3.7	69
107	8	East London	46.4	80.9	85.7	75	16.8	4.4	114.3	5.5	51.9
108	4	Westminster	46.2	81.4	80.9	68.6	17.9	4.3	117.7	6.7	57
117	1	London Met	37.2	79.8	82.1	72.4	18.1	2.5	103.9	3.4	59.1







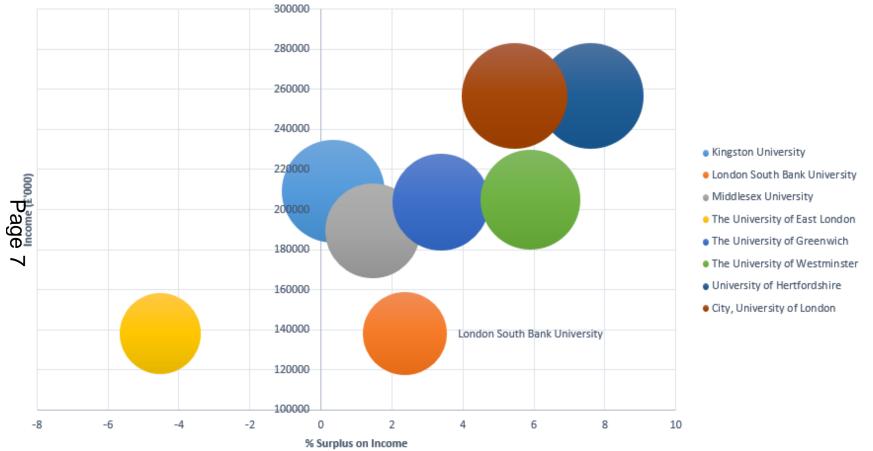


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Shape and Effectiveness

2015/16 Income, Surplus on Income and Student FTE (Size of bubble)



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External Environment

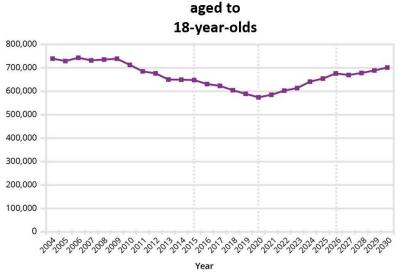
- Brexit (2019)
 - Student numbers
 - Structural funds
 - Research funds
- Fees debate

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- £9250?
- Differential fees?
- Health bursaries to loans
- Tertiary funding review and vfm review via Education select Committee
- Demographics
 - 75000 fewer 18 year olds from 2015-2020 – but this isn't the main driver behind drop in applications
- Apprenticeships and 2 year degrees

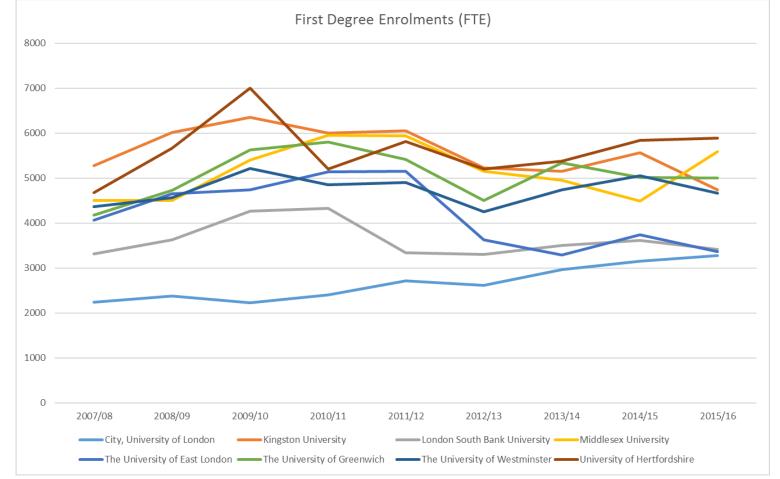
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18-year-olds in England - ONS mid-year population estimates



First Degree Enrolments



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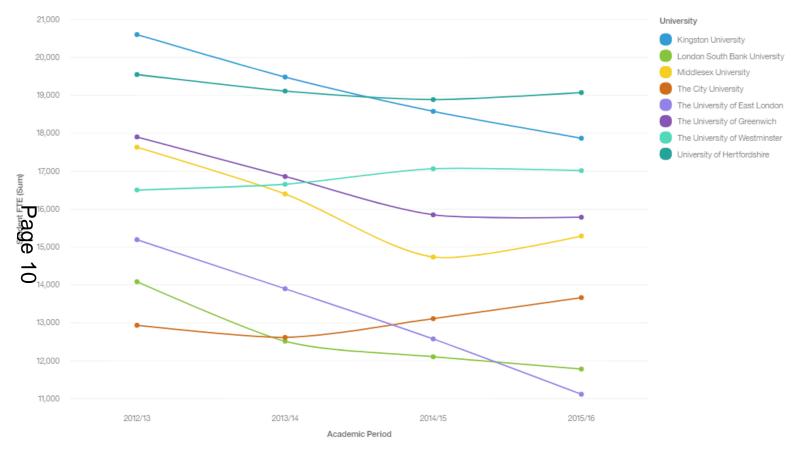


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Page 9

Changing demand

2012/13 to 2015/16 Student FTE by Competitor Group

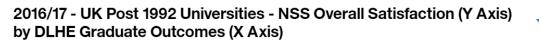


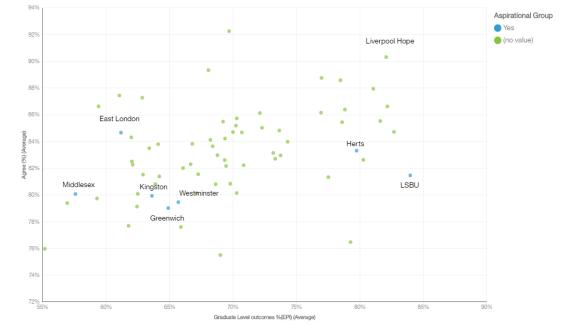
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Regulatory environment and competition

- Guidance for Research Excellence 2021
 - Staff inclusion
 - Impact to 25%
- Information Page 11
 - GDPR data
 - CMA course information
- TEF and 'quality metrics' •
 - LEO data
 - OfS new QA code





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Assumptions

- Success as a university requires continued delivery against core metrics in teaching outcomes and research
- Obtaining £170M by 2020 is unlikely in current climate without seeking acquisitions
- The new environment opens up opportunities for new products such as apprenticeships and two year degrees but specialist delivery/cost base may require specialist vehicles
 - There are additional market opportunities in areas such as CPD, unpackaged products and overseas developments

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Board of Governors Strategy Day Sept 2017

Corporate Strategy: progress towards 2020

Pat Bailey

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Page 13

Reputational improvement

27 KPIs agreed/reviewed by Bd of Governors

Each School has data sets covering:

- **Finances** •
- Student and staff numbers •
- Key metrics (progression rates, NSS, DLHE, LI positions) School Roadmaps align with Corporate Roadmap, covering:

- Teaching & Learning
- **Student Experience**
- Employability •
- Research & Enterprise ۲

- Access
- Internationalization •
- People & Organisation
- **Resources & Infrastructure**

+ League Tables

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1) Teaching & Learning

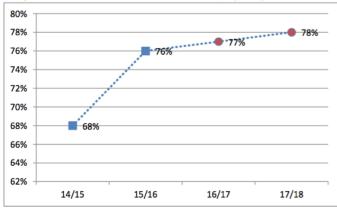
- We're strong on • professionally accredited courses (real world relevance)
- NSS (and TEF) also give ۲ measures of Teaching Quality (TQ) and Learning Environment (LE)
- CRIT is establishing mechanisms for sharing best practice, linked to **DEL** initiatives

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DHLE entry to employment or further study (EPI)



Progress: KPI 1 – DLHE Graduate Level Employability – EPI Cohort





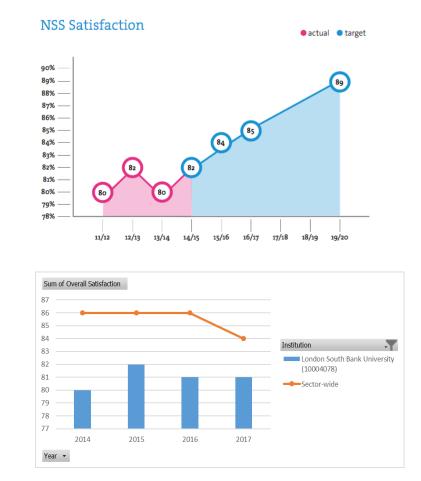
Page 15

2) Student Experience

 Student engagement through SEC, clubs and societies, and initiatives such as the new 'interns' scheme

Page 16

- Targeted input from 'Skills for Learning' team has had big impact
- Apprenticeships a major area for LSBU – *ca* 400 in 2017/18, and 2000 by 2020



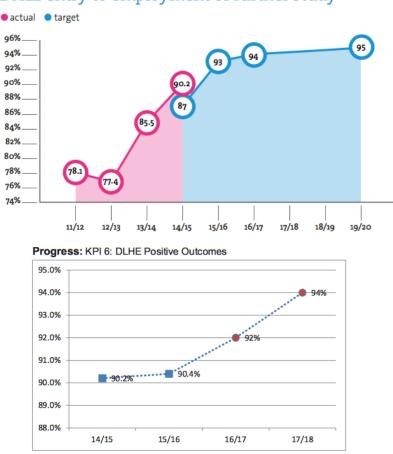
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3) Employability

- All students having the opportunity for work experience as intern, placement or professional practice
- Apprenticeship scheme
 obviously links directly with
 employers and employability
- Employment Agency being launched
- In top quartile of DLHE

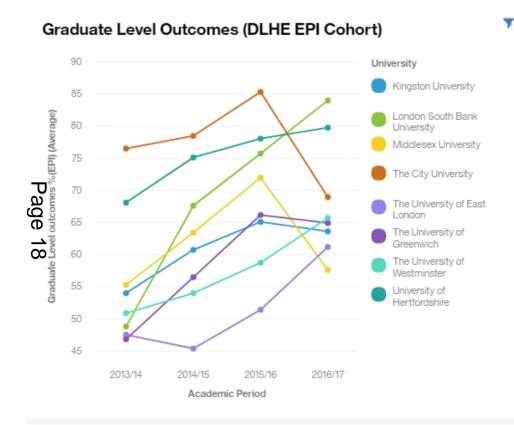
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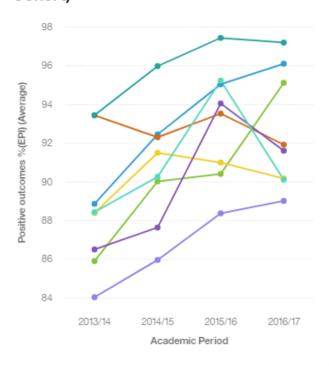
DHLE entry to employment or further study



DLHE Outcomes vs competitors



Positive Outcomes (DLHE EPI Cohort)



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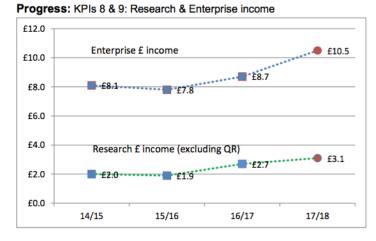
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4) Research & Enterprise

- Research & enterprise income remains a challenge, but have hit R targets and good pipeline – TWI notable
 - Research Centres and Groups now set up, aligning us for REF2021
- AURA data provides annual snapshot, plus quarterly reports to Schools

Enterprise Income e 2015/2016 (forecast) • 2020 17.3 m 8.5 m 5 m 2.1m



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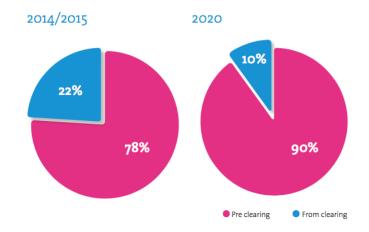
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Page 19

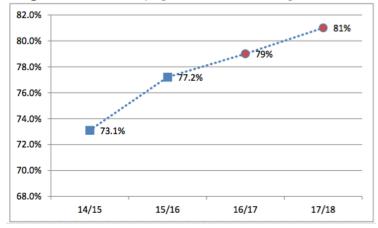
5) Access

- Less dependence on 'clearing' is planned, but this is challenging
- Our record of taking students from LPNs or through non-traditional entry routes strongly contributed to our TEF silver
 - Skills for Learning' team are helping support students who struggle with some of the core skills

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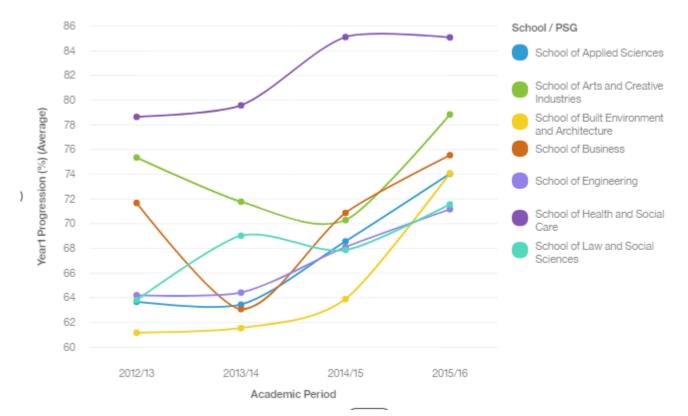


Progress: KPI 15: Year 1 progression % - FT First Degree students





Progression Rates (Yr 1-to-2) in Schools



Year 1 to Year 2 Progression % (FT First Degree Students)

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Page 21

6) Internationalisation

Our relatively low % of int'l students (cf Sector, esp. London) gives us potential in a touch market given Brexit and UKVI

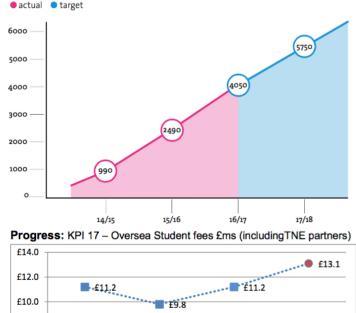
Page 22

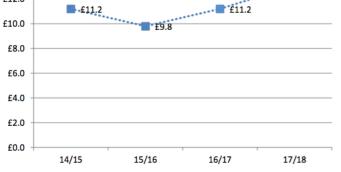
Restructured int'l recruitment team will improve targeted recruitment to LSBU

BUE numbers rising fast: 2400 (16/17); 3900 (17/18); 6500 (18/19); 10,000? (19/20)

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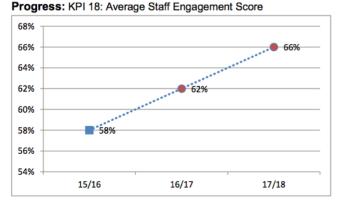


7) People & Organisation

- Employee Engagement Survey triggered new initiatives; Pulse Survey at Easter showed big improvement in staff engagement and confidence
- Academic Framework is
 impacting positively on those
 staff; similar structure being
 explored for PSGs
- EDI includes 4 networks, and working towards gender and RE charter marks

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8) Resources & Infrastructure

- Only university to hold 4
 Excellence in Customer
 Service Awards hope to
 see this reflected in NSS
 feedback
 - Commitment to embedding sustainability across LSBU, and have already met 2020 carbon reduction target

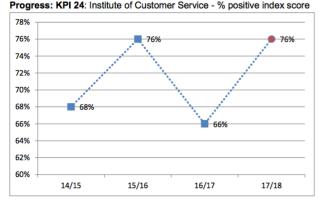
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 Major plans for development of the Estate (incl. St. George's Q)

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Student satisfaction ratings with facilities and environment

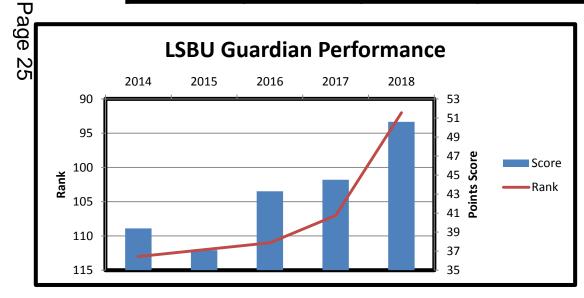






League Tables

Table	2015	2016	2017	2018
CUG	120/123	119/126	115/127	108/129
Guardian	112/116	111/119	107/119	92/121
Sunday Times	122/123	120/127	120/128	106/128



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Reputational improvement in 2017

- TEF Silver (valid for 3 years; subject TEF soon)
- Entered both international league tables for 1st time
- QS 4 stars
- 🖗 Guardian top100
- Up 14 places in Times/ST league table;

University of the Year for Graduate Employment

• THE Entrepreneurial University of the Year

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Key challenges

Core projects

- Branding and student recruitment (esp. UG)
- Apprenticeships
- Family of educational
- Page providers
- Impact of fees debate, and 5% surplus p.a.
- Core metrics (for TEF and subject-TEF)

Student Journey (incl. SRS and IPTE)

- Digital Environment
- LSBU's 'educational offer' (incl. portfolio)
- Estates (incl. St. G's Q and Passmore Centre)
- Diversification (e.g. CPD)





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UK Market Analysis 2013 to 2015 A LOOK AT TRENDS ACROSS THE UG AND PG MARKETS

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Agenda Item 4

Market Analysis 2013/14 - 2015/16

Reporting Context

- Data analyses HESA Enrolment figures for new enrolling students on an FTE basis between 2013/14 to 2015/16
- Data looks at subject demand based on JACS subject codes which does not necessarily reflect course offering or school allocation
- Focus on London market contrasting trends between modern and traditional institutions

Traditional Institutions	Modern Institutions
Birkbeck College	City, University of London
Brunel University London	Kingston University
Goldsmiths College	London Metropolitan University
Imperial College	London South Bank University
King's College London	Middlesex University
London School of Economics	St Mary's University, Twickenham
Queen Mary University of London	The University of East London
Royal Holloway	The University of Greenwich
School of Oriental and African Studies	Roehampton University
St George's, University of London	The University of West London
University College London	The University of Westminster
University of the Arts, London	Con the

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London South Bank University

UK Market Key Highlights

General

- New enrolments across all institutions up by 2% whilst London market grew by the UK up 10%
 ~ led by surge within traditional institutions
- HSC commissioned courses grew by 6% nationally and similarly within for LSBU but positon is pre-bursary removal
- Post the removal of caps, traditionals have taken greater share of market for both UG and PG
- Up to 2015 entry, LSBU's recruitment performance was in the median of its competitor

UG

- London Moderns have a clear edge in certain subjects, business, Allied Health and Education Business is largest subject area, however recent UG growth is driven primarily by three institutions \Box Creative arts, social studies and communications have experienced reasonable sector growth
 - Creative arts, social studies and communications have experienced reasonable sector growth and are interesting areas for LSBU to build on
 - LSBU's portfolio mix is less diverse with a relatively long tail of low level subject areas in contrast to competitors
 - Only 5 subject areas are in growth across moderns institutions v 15 across traditionals

PG

- London moderns saw overall decline in PG with only 3 out of 11 institutions growing the new student intake over the period
- PG subject level demand saw significant drops in business and education reflecting a switch in demand from moderns to traditional institutions
- In contrast, moderns saw strong growth in Arch'/Build' and Allied Health which were also high growth subjects across traditional institutions

Considerations for LSBU Executives to inform business strategy

Size and Shape	Based on UG / PG trend and most recent enrolment cycle, what does future demand look like for London moderns and what are the implications for size and shape of LSBU?				
Portfolio Mix	Given the changing mix in subject level demand, which subjects present the greatest opportunity for LSBU? Where to focus our offer to drive growth Best fit with professional / technical education				
Competitors	Which competitors are the soft targets for market share growth amongst London moderns? Can we grow share from traditional institutions in specific subject and if yes, which ones and how?				
Allied Health	 Strong historic growth in UG and PG and across moderns and traditionals Area of reputational strength for LSBU and possible conflation of providers Strong relationships with trusts Opportunity to leverage developing apprenticeship demand Real estate restrictive Trust partnership expansion dependent 				
Business	 + Largest segment of both UG market, growing within modern and traditional institutions + Largest segment with PG market but - Experiencing significant PG decline within modern institutions + Relevantly low cost to deliver + Internationally relevant ? Growth will require differentiated value proposition, possibly stand a long brand ? Real estate requirement? 				
Architecture & Building	 High growth in PG and strong growth in UG across modern and traditional institutions Real estate dependent 				

Page 32

Brand Monitoring 2013 to 2015 A LOOK AT AWARENESS AND PERCEPTIONS OF THE LSBU BRAND

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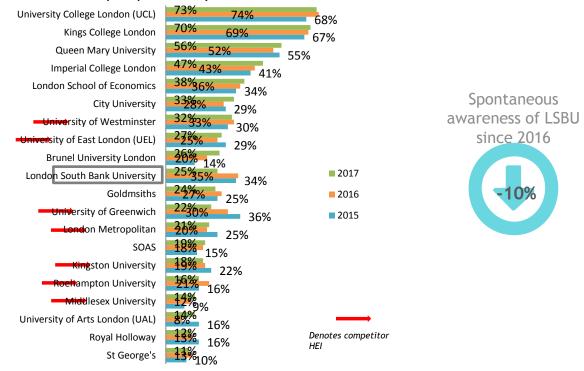
LSBU's reputation within the sector is growing based on league table rankings



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However spontaneous brand awareness has dropped by a third over three years amongst aspirational applicants



Top 20 spontaneously cited London HEIs in 2017*

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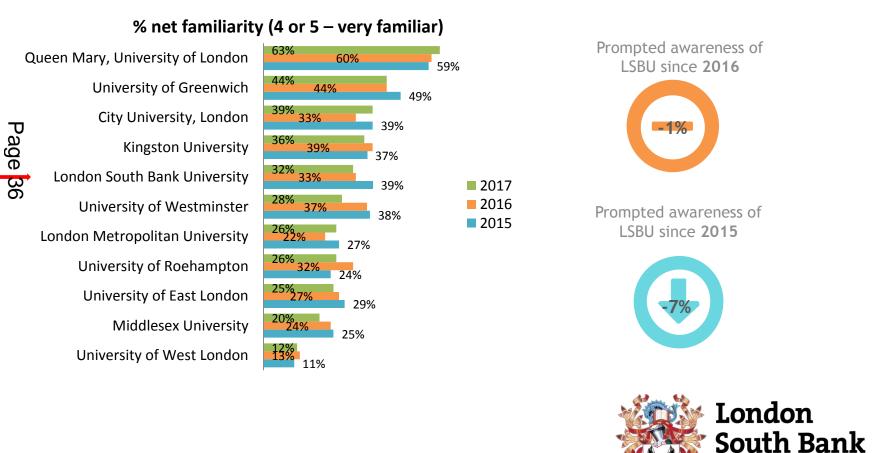
Data from Applicant Brand Trackers, 2015-2017 conducted by Youthsight



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Page 35

When prompted, LSBU brand awareness has also fallen over the same period amongst the same target group

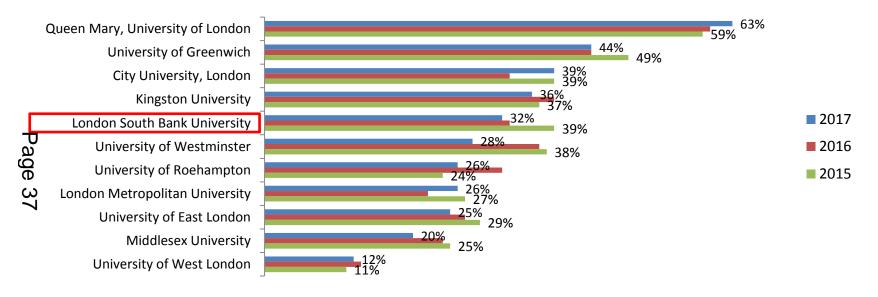


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Data from Applicant Brand Trackers, 2015-2017 conducted by Youthsight

Jniversity

There is a wider trend towards reducing brand awareness across London moderns

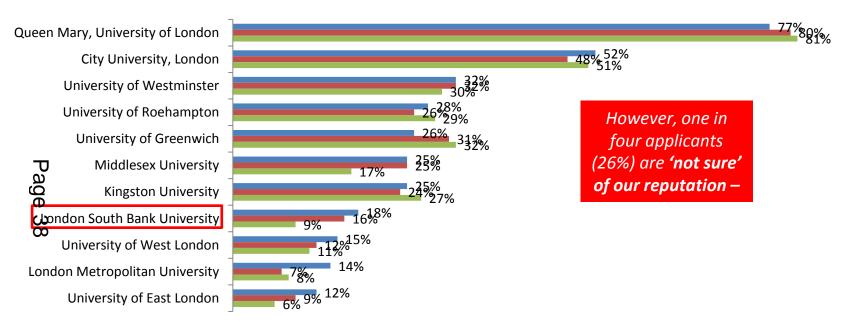


Only Queen Mary has seen increased familiarity over the past three years – London South Bank University has 'lost mental ground' by 7 percentage points

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Where we have some familiarity, our reputation has increased



2017 2016 2015

Suggestions of increasing reputation highlight potential scope to build on – however it is essential to consolidate familiarity to maximise these perceptions

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And our brand is primarily associated with attributes which have both pros and cons



Diverse, inclusive and accessible – a cosmopolitan university, but one that may be seen as 'easy to get into'

London Modern, interesting but unknown – generic description for a new university, with no deeper meaning

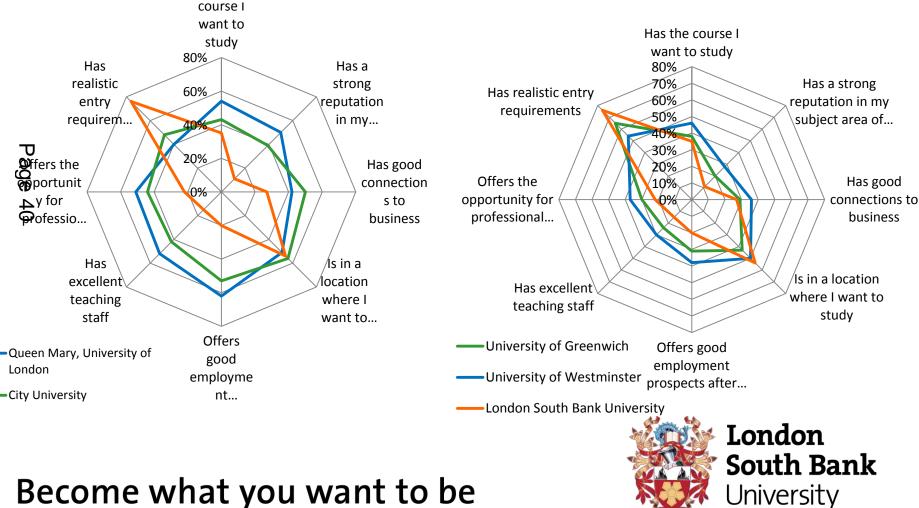
Good, Bad and **Average** – we need to do more to create, communicate and maintain a more consistent view



Page 39

Become what you want to be

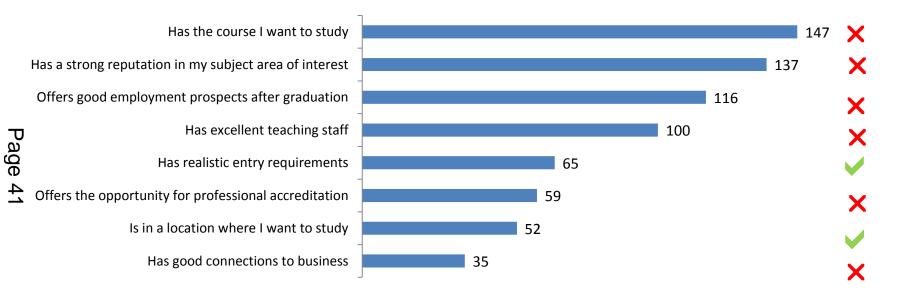
LSBU's strongest brand associations are with realistic entry and location



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Data from Applicant Brand Trackers, 2015-2017 conducted by Youthsight

And our strongest brand associations do not reflect attributes which are most important to new applicants



When applying to university, prospective students are most concerned about relevant course availability, but also deeper considerations around reputation in subject specialisms, and the potential impact of their degree on future employment considerations

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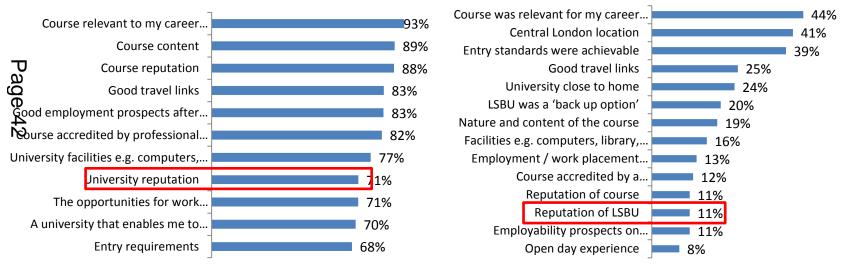
London South Bank University

Attribute

For LSBU joiners, institution reputation is less important versus course specifics. For decliners, reputation is barely considered

Reasons for coming to LSBU, New Student Survey 2016/17

Reasons for applying to LSBU before declining, Decliners Survey 2016/17



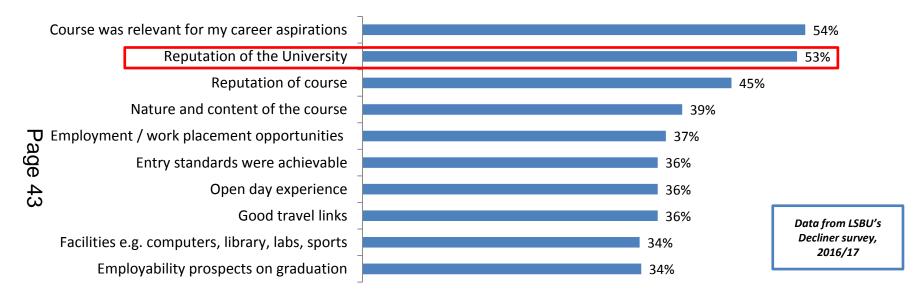
Applicants who declined an offer primarily applied to LSBU due to its location, and achievable entry requirements – our reputation is not a consideration at all

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Data from LSBU New Student Survey 2016

However for those who decline an LSBU offer, the reputation of their first choice institution is a critical factor



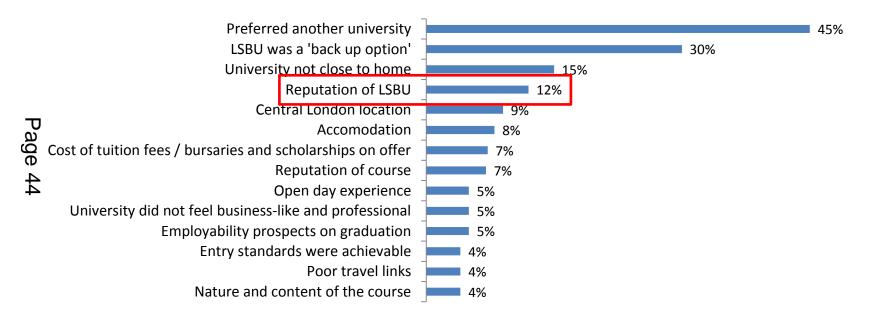
Beyond the pre-requisite of course relevance, the decision to accept another university's offer is driven by reputational factors around both institution and course – even future employability prospects are a much lesser consideration

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Data from LSBU Decliner Survey 2016

Amongst decliners, the lack of a strong reputation means that for a high proportion, LSBU is a 'back-up'



While LSBU's reputation is only cited as a reason not to accept by 12% of decliners, the fact that 45% 'prefer another university' is likely to be tied to stronger reputations of other institutions

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Data from LSBU Decliner Survey 2016

Previous brand work organised LSBU thinking and informed further development





Page 45

Exploring brand ideas that will connect with the consumer

From...

Transforming lives, businesses and communities

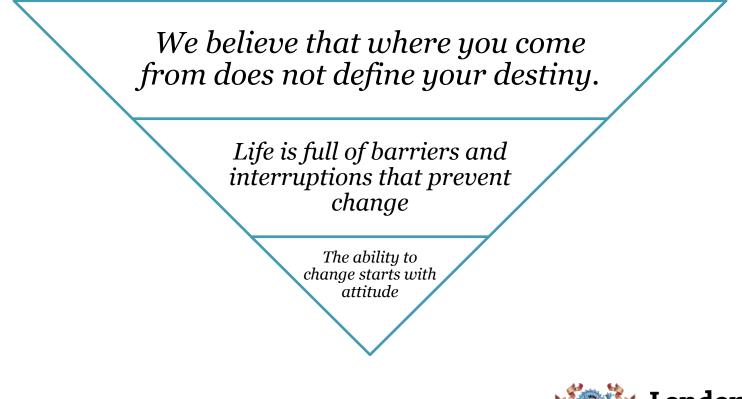
То...

Where you come from does not define your destiny

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But it was still too generic...



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It's an idea that's already intrinsic to everything we do...



Figure 3: our real world impact, driven by integrated teaching and learning, research and innovation, enterprise and external engagement

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As an adjective it defines an attitude...

Enterprising

Page

49

An enterprising person is one who comes across a pile of scrap metal and sees the making of a wonderful sculpture. An enterprising person is one who drives through an old decrepit part of town and sees a new housing development. An enterprising person is one who sees opportunity in all areas of life.

To be enterprising is to keep your eyes open and your mind active. It's to be skilled enough, confident enough, creative enough and disciplined enough to seize opportunities that present themselves...regardless of the [environment].

Enterprising people always see the future in the present. Enterprising people always find a way to take advantage of a situation, not be burdened by it. And enterprising people aren't lazy. They don't wait for opportunities to come to them, they go after the opportunities. Enterprise means always finding a way to keep yourself actively working toward your ambition.

Enterprise is two things. The first is creativity. You need creativity to see what's out there and to shape it to your advantage. You need creativity to look at the world a little differently. You need creativity to take a different approach, to be different.

What goes hand-in-hand with the creativity of enterprise is the second requirement: the courage to be creative. You need courage to see things differently, courage to go against the crowd, courage to take a different approach, courage to stand alone if you have to, courage to choose activity over inactivity.

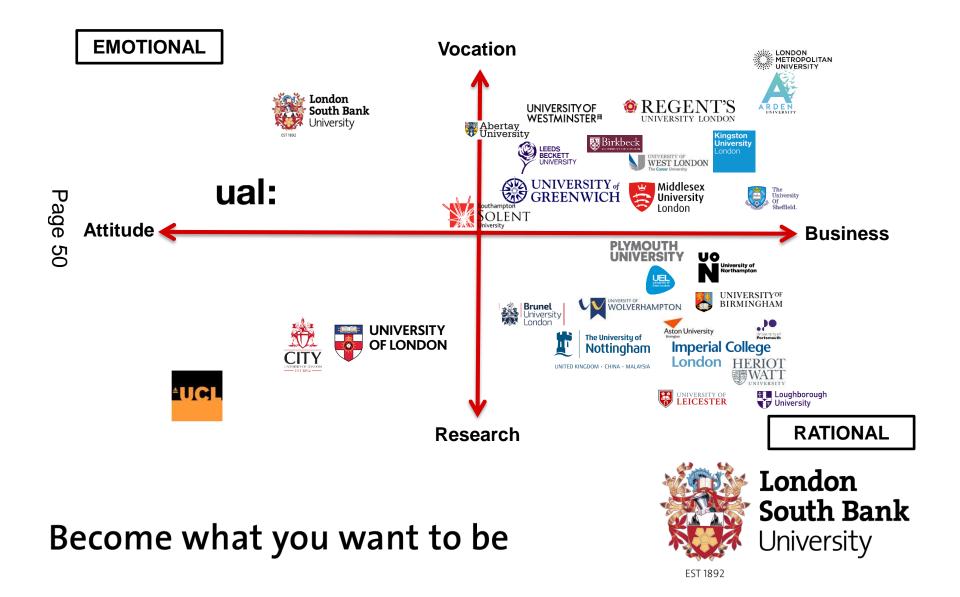
And lastly, being enterprising doesn't just relate to the ability to make money. Being enterprising also means feeling good enough about yourself, having enough self worth to want to seek advantages and opportunities that will make a difference in your future. And by doing so you will increase your confidence, your courage, your creativity and your self-worth—your enterprising nature.

Jim Rohn © 2001, http://www.jimrohn.com

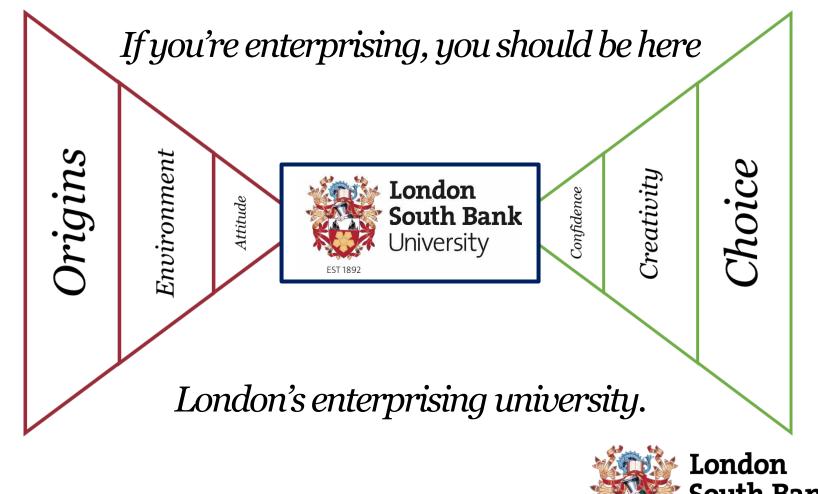
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Competition in Our Territory?



The LSBU Difference...



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Page 51



ac.uk of tomorrow

Natalie's

Clearing

LONDON METROPOLITAN UNIVERSITY

story

University

London

Page 52

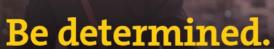
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Get there faster with a postgrad course in 2017.

Our courses are accredited or developed with industry so that 9 out of 10 students are in work or further study 6 months after graduation.

Apply now Isbu.ac.uk/postgraduate Become what you want to be

UNIVERSITY

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London South Bank





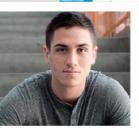
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