

INTRODUCTION - Why Review Now?

LUSU is currently two years into the implementation of its strategic plan 2009-12. Therefore it is prudent to reflect upon holistically what the organization has achieved to date against its published goals and objectives. In addition, the higher education landscape both locally and nationally is metamorphosing. Changes are fundamental and are perceived as potentially altering LUSU's own view of its role and its relationship with the University.

"It has been an extraordinary few weeks for higher education, and there are some more extraordinary weeks to come"

Aaron Porter, NUS President November 2010 speaking at the 1994 Group Student Experience Conference.

The Changing Context

- There has been a change in Government and with it a shift in the agenda surrounding higher education. Despite the previous position of the Liberal Democrats on the right to a free education, in coalition this position has changed. Opposition MP John Denham in November commented, "The government's plans are not financial but ideological. They are a gamble - withdrawing public money from universities and pushing through a market that they know will contribute little to deficit reduction especially in the medium term but it will create turmoil for universities and mountains of debt for students.
- The Browne Review has been released and there has been a government response to it, although as yet we are awaiting the white paper. There will also be a parliamentary vote on the fees increase on Thursday 8th December 2010.
- There have been suggestions that quangos relating to Higher Education will merge and/or disappear. Notably in areas of quality assurance and fair access.
- Widespread national student protests against changes to the fees system which Lancaster has participated and further action at a local level.

The impacts of these changes have been widely mooted and have ranged from it being a storm in a tea cup, like the original introduction of fees into higher education and that rises will soon be forgotten, to the raising of the cap transforming the relationship irrevocably between student and institution. Questions are being asked as to whether Students' Unions and their institutions will be able to continue trying to work in partnership in this new environment, *"This market totalitarianism will utterly and irreversibly transform the relationship between institutions and students...The approach we have taken in the past and today is no longer fit for purpose in the proposed new landscape"*, Aaron Porter, NUS President. If institutions charge higher fees they must be prepared to provide the appropriate student experience and student expectation will have clearly been raised. Students' Unions will be seeking to hold Universities accountable for this provision and enforceable minimum standards: a real quality assurance role. The NUS is advocating that Unions need to go back to basics and look at students' rights and institutions responsibilities under charters and covenants, as well as external independent scrutiny for the sector.

At the recent widely reported 1994 Student Experience Conference, the NUS President extended this vision stating:

- *Price will come in like a sledgehammer and dominate the decision-making process, pushing out many other crucial factors. It is doubtful that the provision of information and guidance will be improved quickly enough, and even if they are, they will be insufficient to compete with such a powerful signal about quality, however inaccurate.*
- *I want hidden costs and secondary charges necessary for an average student to learn effectively, from bench fees to charges for printing in the library, banned outright. If a fee of 9,000 pounds a year isn't all-inclusive, something is badly wrong. And all of this should be underpinned by new guarantees on supporting student representation and advocacy at the institutional level.*
- *If students are to pay hugely increased fees, then they must have increased rights and increased power. Some of that will come through market forces – but we must recognize that higher education is necessarily going to be a very different kind of market to that which operates in other sectors. We will have to plan and prepare for that, carefully but urgently.*
- *I think the governance arrangements for all of these structures must be built on the principle of independence with strong user involvement.*

The University management at Lancaster appears to support marketisation and this approach is likely to set LUSU and LU on a collision course. Already within the past 12 months the University, has and is undertaking the following:

- A review of all central services within the University. This is driven by the need to make efficiency savings.
- All services have been required to make 5% cuts on their budgets.
- A number of front line services have already been diluted or are due to close.
- Central services have been restructured into a one-stop shop.
- More powers have been devolved from the centre to the faculty level decision-making.
- Governance changes within LU have substantively altered where operational decisions are made and weakened direct student representation. This trend continues.
- An increased number of global collaborations under the Lancaster brand. Their appetite for international partnerships has grown exponentially.

In addition, the University has stated that the CSR is not set to change the makeup of the University in terms of balance of students and the academic structures. There has been positive spin regarding our resilience due to research capacity and international student numbers. The University has broken into the top 10 institutions within the UK in 2010 and seeks to remain in this position. The focus within LU will be how the Lancaster experience can be packaged up going forward.

Framework for Review

To enable a review of the current plan to take place, the following activity has been undertaken:

- Opportunity for full time officers and management team to discuss progress against goals. This has produced much of the analysis and commentary around performance.
- There has been an audit of significant activity over the past 2 years (based on what has been reported in Trustee Reports and Operating Plans and by staff and officers). This has been mapped back onto the goals.
- There has been an analysis of the external environment through conferences, press and other secondary data.
- Based on the above, a performance assessment rating has been made against each goal. The scale is as follows: poor/ satisfactory/good/excellent.

For Consideration By the Trustee Board

There is now an opportunity over the next couple of months to consider what future strategic direction LUSU should take. Bearing in mind the changing context and that the plan has only a further 12months to run LUSU could:

- Go forward with existing plan and allow it to run its course until 2012, taking account of the action points identified in this review and begin to prepare a new plan in mid 2011-12
- Develop a new strategic plan for implementation Summer 2011.

The Trustee Board needs to ensure that the appropriate resources are made available over the next 6months to enable further progress.

SNAP SHOT OF PROGRESS AGAINST GOALS

A	<i>Defining a 'good quality' LUSU and university experience</i>	Satisfactory
B	<i>Extending the visibility and understanding of our union: improve how we communicate what we do and how</i>	Good
C	<i>Increasing our 'connection' with our members: maximizing opportunities to positively engage with us</i>	Good
D	<i>Securing better facilities and resources for students to live, learn and play in</i>	Poor/Good*
E	<i>Promoting community involvement & collective action that benefits the wider student experience</i>	Good
F	<i>Empowering and facilitating members to develop the skills to achieve in particular our Union, JCR and PGSA officers</i>	Good
G	<i>Actively widen engagement across our membership ensuring democratic structures are fit for purpose</i>	Satisfactory
H	<i>Increase effectiveness & range of our representation within the University on educational, welfare & recreational issues</i>	Satisfactory
I	<i>Increase the positive profile of students and their experience within the city and region</i>	Good
J	<i>Engage with known and emergent national representation agendas</i>	Good
K	<i>Ensure that financial, governance and planning processes are fit for purpose and legally compliant</i>	Good
L	<i>Stabilize and where viable grow existing income streams</i>	Good
M	<i>Develop a diversity of funding streams</i>	Good
N	<i>Improve service through maximizing current resources and new technological advances</i>	Satisfactory
O	<i>Understand and where possible, limit the negative environmental and ethical impacts of our organization</i>	Good

*The split rating denotes that poor progress has been made in trying to secure additional space outside of LUSU's control, but good progress has been made improving facilities and resources, which LUSU has direct management or control of.

PROGRESS IN DETAIL AGAINST EACH GOAL

Increasing Our Relevancy By

A - Defining a 'good quality' lusu and university experience - Satisfactory

PROGRESS

- Although there is no mechanism to systematically gauge student opinion on the student experience, LUSU has continued to undertake an annual survey looking at the perceptions of opportunities and services from a range of psychographic groups. In addition, during the period a number of other surveys have been deployed around particularly concerning general satisfaction with commercial services. It must be questioned whether the information from this work has been utilized to its fullest potential.
- Increased use of secondary/desk based research from LU and national surveys. This has been coupled with a recent adoption of Policy TV to stay abreast of national conferences re the student experience.
- Students have been encouraged to develop their own ideas and university experience in a number of ways. Although this has not constituted the cultural shift first envisaged by the plan, there have been increased numbers of students engaged in LUSU events, societies and clubs, media, entrepreneurship and volunteering. These students have all been shaping and defining their own co curricular experience.

CHALLENGES TO PROGRESS OVER THE PREVIOUS PERIOD

- LUSU's capacity to conduct its own research has been reduced due to a decision to dismantle the student staff research team, due to a fall in commissioned work and the end of the student employment fund.
- The student body has become bombarded by indicative survey work through social networking etc. leading to a perception of survey weariness. To combat this, LUSU has reduced its own activity where there is existing, good quality research, taking place i.e. the academic remit and the NSS, PTes Pres and Opinion Panel.
- The student experience is quite often dependant upon collaborative working with LU. Where there has been a difference between LU and LUSU's perception of a 'good quality' student experience it has sometimes been difficult to affect change. Most notably, these have been in areas such as central support and welfare provision. Over the period LUSU has not always been consulted regarding key decisions, which affect the student experience.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION

- There needs to be a clearer link between operating plans and information regarding the student experience and feedback.
- More emphasis needs to be placed upon LUSU investigating what constitutes a good quality student experience.
- Clearer channels for feedback from individual members need to be developed.
- LUSU needs to articulate its successes and impact back out to the membership.

- LUSU needs to demonstrate the value in being consulted regarding the student experience, so it has a more prominent role in experience shaping.
- Ensuring definition of 'good quality' maps to the potential paradigm shift in university expectations in lieu of Browne Review/university funding alterations. A marketized HE sector, results in greater expectations for students as the customer.
- The Union should adopt a quality assurance role in relation to the student experience – a shift from a critical friend to more rigorously holding LU to account for its promises.
- LUSU services should reflect upon their own customer care and service standards as part of rebranding work.

B - Extending the visibility and understanding of our union: improve how we communicate what we do and how - Good

PROGRESS

- Undertaken an extensive re branding project about LUSU through which the basis has been built for the projection of a much stronger unified identity.
- Union communication channels have improved in terms of both content and design i.e. Squeak and LUSU online but further work needs to be done.
- Better joining up of the Student Media gives the potential to improve how LUSU communicates what we do under the auspices of the VP Communications. It must be stated though that these media changes are in their infancy and the impact is yet to be seen.
- Over the period LUSU has continued to grow and improved activity in Intro Week giving a clearer view of what LUSU is all about. It is believed that larger numbers have engaged with the organization during this period. Continuation of changes through the branding project will not extend activity further but make it more transparent in Intro week 2011 what LUSU is responsible for.
- More emphasis has been placed upon the Winter Officer Conference and the Social and Events Group to name but two, to communicate more holistically what LUSU does.
- Internal communications amongst officers have been improved by a Cross Campus Committee, which has enabled better joint working (the potential impact on the membership needs to be fully realized).
- Greater use of direct marketing techniques where activity has been about eliciting a response from the membership.

CHALLENGES TO PROGRESS OVER THE PREVIOUS PERIOD

- Despite the change in VP Comms/SCAN Editor portfolio, their ability to be able to champion media communications issues has been tempered by the demands of SCAN production. There remains a conflict in the position's role.
- LUSU continues to be an extremely complex organization, which struggles to articulate what it does to members who have limited interaction with us.

- Attempts to improve internal communications between officers and staff such as the Spine have been of limited success and have not lived up to previous activity. LUSU's ability to communicate out to its officers and wider membership is often dependent upon cascading to a small number of officers.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION

- LUSU needs to further enable the creation of a joined up message about itself and to raise awareness of its opportunities:
 - Improved College JCR buy-in inter-officer communication. Perhaps a different approach needs to be adopted? Dialogue as opposed to push communications. Officers need to champion their own areas of interest not just internally but externally to the members
 - Demonstrate our impact to the membership and therefore relevancy more systematically
 - Make the Student Media Board live – engender real collaborative working as the 'norm' between the media groups and for them to feel part of LUSU.
 - Deliver the second part of the branding project seeking to capture the hearts and minds of officers and staff.
 - Create clear channels for our groups to get their message out to the membership
- Liaise more closely with the University's marketing department to maximize exposure for itself through LU publications and activities and ensuring we take credit for the parts of the experience we deliver.
- Re-evaluate the position of the VP Comms/SCAN Editor to see if the editor role can be split from the Full Time Officer position. This could potentially have resource implications but there is a belief that the communications dimension of the officership cannot be fully realized until a separation is considered.
- Look at additional staff resource to support the VP Comms and the further integration of the student media.

C - Increasing our 'connection' with our members: maximizing opportunities to positively engage with us- Good

PROGRESS

- LUSU Involve had a target to increase the number of students engaging in activity with them to 1500 by 2011-12. This target is likely to be achieved in 2010-11 and activities available have been broadened.
- A Social and Events Group has been established to enable more officers to shape cross campus social activity. This has led to the establishment of popular new events such as comedy.
- New events such as Christmas Fest, Campus Fest, and the International Students Welcome have been developed which have created new ways for members to either get involved with the delivery of activity or attend. All have been fun and high profile.
- Increased numbers of opportunities have been developed to enable students to get involved without standing for office – these have included the creation of a greater

<p>number of societies (raised from 70 -120 over the period) and volunteering to support diversity initiatives such as a Language Exchange and international events.</p> <ul style="list-style-type: none"> ➤ Work is being done to strengthen the role of none full-time Union Officers at Union Council, Executive and Cross Campus Committee ➤ The Purplecard as our membership benefit card has continued to act as a positive artifact for the organization. Since 2009, it has seen growth in 1200 sales and offers students better value opportunities to engage with both LUSU services and commercial third parties.
<p>CHALLENGES TO PROGRESS OVER THE PREVIOUS PERIOD</p>
<ul style="list-style-type: none"> ➤ LUSU remains weak when it comes to face-to-face connection with members. There is still a preference to use committee structures, direct marketing and push communications. Attempts to get officers to work outside of the bunker and get out and talk have faltered. ➤ Involvement in EWD activities has not moved forward in a similar way to other parts of the organization. This officer group have not been able to achieve traction in progressing issues.
<p>FUTURE IMPLEMENTATION REQUIRED/DIRECTION</p>
<ul style="list-style-type: none"> ➤ Promote getting out and talking to the membership – learn lessons from other unions who do this effectively such as Bath and Leeds. ➤ Potentially look at steering group representation. ➤ Opening up structures to enable non-elected members. ➤ Help define more substantive roles for cross campus officers by empowering them to engage with membership on behalf of Full Time Officers.

<p><i>D - Securing better facilities and resources for students to live, learn and play in – poor/good*</i></p>
<p>PROGRESS</p>
<ul style="list-style-type: none"> ➤ Continued to participate in discussions to develop the new sports centre and improve out door sports facilities. This dialogue has remained positive and the project remains on track. Though the emphasis is now upon the business operations of the facility and ensuring members are not unfairly affected by pricing changes. ➤ Discussions re academic space provision have continued to result in positive developments across campus such as lecture theatre refurbishments and departmental up grades. ➤ LUSU Living has continued to upgrade and add value to its off-campus housing offering. It is likely that this will be even more significant in coming years as more students have to seek a city alternative. ➤ Invested in the Sugarhouse environment to ensure that maintenance of decent quality offer. ➤ Funds have been invested in P/A equipment to support social activity.

- More space has been secured for GreenLancaster and LUSU Involve.
- The LU Cinema has a refurbished space from which to operate by Autumn 2011.

CHALLENGES TO PROGRESS OVER THE PREVIOUS PERIOD

- LUSU has continued its efforts to try and improve its own facilities and general campus facilities for the membership. There has been no substantive change in LUSU's own space/facilities provision. Mooted ideas regarding the old sports centre becoming a new home for the Union are being blocked at present at a high level within the institution.
- Activity groups still depend upon porta kabins for storage despite this accommodation being damp. This limits their ability to develop and ambition.
- College bar spaces have been physically reinvested in but the operation of said facilities has still not been addressed, despite continued dialogue with LU regarding this issue.
- There has been little movement with regard to welfare provision. No real change in central space for postgraduates and off campus students.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION

- The Browne Review and what is adopted post it will place a different complexion on what are facilities fit to live, learn and play in. It is likely that the expectation bar will be raised once more under a new fee regime.
- LUSU needs to develop a detailed vision and blueprint itself, as working in partnership with the Facilities Division has been subject to political interference. Create a clear view of LUSU's priorities for space as a whole – a vision for student union environment of the future. Concrete ideas are needed.
- Ensure that there are funds ear marked for capital investment.
- Develop a Union vision for the use of the College Bars.
- Ensure that the costs of LU's facilities are kept proportionate under the new fees regime.
- Empower JCRs to fight for their own collegiate facilities.
- Starting a dialogue with the city regarding future development and student expectation.

* Poor progress has been made in trying to secure additional space outside of LUSU's control but good progress has been made improving facilities and resources, which LUSU has direct management or control of.

E - Promoting community involvement & collective action that benefits the wider student experience (Read in conjunction with I)– Good

PROGRESS

- The numbers of students engaged in LUSU Involve opportunities has increased. It is anticipated that targets for 2011-12 of having 1500 students engaged will be reached in 2010-11.
- Campaign activity has been taking place in conjunction with fellow Northwest students' unions most notably UCUM and UCLAN to take collective action on fee changes and cuts in higher education. This collective action has led to higher than average participation rates compared to other unions and effective use of resources.
- Partnership working has also been taking place with UCUM and the Police to promote positive approaches to students' socializing in the city.

CHALLENGES TO PROGRESS OVER THE PERIOD

- In terms of collective action, there is only so much that LUSU can do without losing credibility with the University and wider bodies. The political mood post Browne and CSR has tended towards more direct forms of action, which have consequences for involvement. This is an emergent situation. Due to this difficult position, splinter groups are forming within the membership, which poses issues concerning LUSU and its members and the University and its students.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION

- Continuation of current work.
- Keep a watching brief on campaigns.
- Strengthen LUSU's campaigning capabilities – consider urgently in the light of the changed environment how we develop a campaign academy engaging other campus activist groups.

F - Empowering and facilitating members to develop the skills to achieve in particular our Union, JCR and PGSA officers -Good

PROGRESS

- Improved approach to annual officer training and now enable all officers to attend.
- Post election inductions introduced.
- Improved approach to full time officer training and development allowing for an incremental development of skills.
- Helped develop the Lancaster Award and have championed engagement with it amongst officer and volunteer groups.
- Have increased the number of volunteer opportunities, which attract academic accreditation. There has been an increase in the number of students participating in

modules and a rise in the number of departments offering such courses (working in conjunction with LUSU Involve)

- Introduced LUSU Awards to encourage officer and staff development and best practice.
- Change in emphasis regarding entrepreneurship, the definition of enterprise has been stretched and more activity created to promote employability amongst officers and members. This has included new workshops via Involve, initiatives with Students In Free Enterprise and the Making It In the Media event.
- The past 2 years has seen further improvements to training for academic representatives in departments and the provision of better on going support and involvement opportunities. As yet it is unclear what the impact of this has been.
- LUSU has continued to maintain its IIP status and LUSU Involve has kept Investor In Volunteering accreditation.
- Through international partnerships, LUSU is developing opportunities for reciprocal visits between Lancaster campuses to enable members to develop new skills through practical experiences with an international dimension. So far, this work has included students from the UK and India but will expand in 2011 to Malaysia.

CHALLENGES TO PROGRESS OVER THE PERIOD

- The PGSA has still not functioned effectively over the period. In fact there have been several periods when officer roles have been empty. This has made supporting skills development amongst this group impossible.
- With regard to the Lancaster Award, LUSU had been in discussions with LU as to how to quantify the impact LUSU has on students being able to attain the award. This dialogue appears to have ceased.
- Attempts were made to introduce in term, top up training opportunities for officers. These were not well attended and activity has ceased.
- Activity to support society executives still needs to be properly embedded. Provision for these groups has been inconsistent.
- It had been hoped that Lancaster would participate in an NUS initiative the 'Leadership Academy' to develop skills amongst full time officers. This project failed to secure funding and therefore is currently shelved.
- The lead member of staff in this area went on maternity leave during the period and therefore work had to be delayed and scaled back.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION

- Need to provide more robust ongoing support and discourse with officers after Winter Officer Conference with certain remits.
- Provide training opportunities to officers elected via Bye Elections, Sub Committees and to the PGSA.
- Work with the Dean of Graduate School to look at developing leadership skills amongst PGT/PGR students in an attempt to use this as a catalyst to drive forward representation agendas with these groups.
- LUSU to manage collaborative provision summer schools on behalf of LU providing development opportunities for UK members and international associate members.

Representing More Effectively

G Actively widen engagement across our membership ensuring democratic structures are fit for purpose - satisfactory

PROGRESS

- Undertaken constitutional review, full Bye Law review and reconfigured all officers' roles both full time, college and cross campus. This has resulted in a more relevant officer base, freer electoral procedures, new initiatives to facilitate greater cooperation amongst cross campus officers and a more cohesive officer body.
- E-Voting has been introduced allowing all full time members of the organization to vote remotely over a longer time frame. The introduction has not be without incident and in itself will not deliver high turnouts but has the capacity to enable higher levels of voter engagement.
- Recently employed a number of intern posts to increase our capacity to deliver.
- Created a Single Equality Scheme to ensure that the needs of individuals with protected characteristics are considered. This in itself though does not deliver outcomes but provides a framework within which to create actions and operate.
- Increased the number of academic representatives at a departmental level.
- Introduced volunteers back into advice services to help promote and deliver diversity work such as international events and a language exchange.

CHALLENGES TO PROGRESS OVER THE PERIOD

- Work regarding diversity and equality has been slow to progress under the plan despite changes to democratic structures. Officer groups have found EWD model difficult.
- Issues with the electronic elections have caused the focus to be upon delivery of the process, as opposed to quality of participation and increasing democratic engagement. It is believed that these were teething problems and that assurance systems are now in place to ensure the mechanics of elections operate smoothly.
- PGSA structure is still in place and still fails on an annual basis leaving a gap in postgraduate representation.
- Engagement levels with postgraduate students, part time and mature students still remains disproportionately low comparative to their numbers.
- The institution has increased its number of international collaborations. This has created an increase in our associate members and also created a need to re-look at support and representation for this group.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION

- Changes to internal structures are still embedding. It is believed that in turn these empowered officers will be better able to perform their roles and engage with the membership.
- Governance review for Postgraduate representation due to commence January 2011. The review will include officer positions and unelected representation.

- LUSU has now set 4 clear targets for the year to progress diversity and equality work.
- Need to reevaluate who is underrepresented within our Union and focus work accordingly. Newly reconfigured sub committees in liberation areas need to set new goals for themselves deliver effective campaigns and activity.
- LUSU to develop a vision for how it intends to develop its relationship with its global membership.

H - Increase effectiveness and range of our representation within the University on educational, welfare and recreational issues

PROGRESS

- LUSU have not necessarily increased the range of representation but the effectiveness of representation has grown in certain areas. Managed to secure positions on the majority of significant working groups with LU to ensure our members. Academic Council has continued to develop its role of advisory body both to the Union Council and University working groups on academic matters.
- Officers have been active in trying to represent members' needs: Campaigns regarding SLDC and the Nurse Unit.
- LUSU has reformed the undergraduate academic representation system creating a larger but more proportionate, number of reps across departments. This has given the potential to increase our effectiveness.
- There has been limited dialogue with LU regarding future student accommodation provision both on and off campus. LUSU is in the process of developing policy to limit any future impacts of over admission on both its self (LUSU Living) and its future members.
- Direct academic representation has been undertaken for the first time with associate members studying in India

CHALLENGES TO PROGRESS OVER THE PERIOD

- Over the period, the University has continued to 'streamline' and de-centre its own governance structures. This in real terms has decreased the representation as formal committees have been removed and replaced by advisory bodies and working groups. This trend continues.
- Postgraduate representation still remains the Achilles Heal. There have been broad discussions with the Dean of Grad Studies as to how to move this forward but as yet; there is no clear direction.
- There is a perception that the Union's representation is too reactive on educational, welfare and recreational issues. The Union responds to what it is faced with, as opposed to having an existing stance/policy position on issues. This could be seen as placing the Union on the back foot.
- As stated previously the University is continuing to grow the number of its international partnerships. During the period there have been major collaborations signed with institutions in India, Pakistan and China. LUSU has only just begun to consider the representational needs of these groups with regard to their education, welfare and extra

curricular provision.
FUTURE IMPLEMENTATION REQUIRED/DIRECTION
<ul style="list-style-type: none"> ➤ The development of clear policy on issues, which affect students. ➤ Seek a revision of the Lancaster Student Charter. ➤ Increased negotiation and advocacy, representation skills within the officer and staff teams. ➤ Delivery of an improved dialogue with postgraduates and a way to represent these groups effectively. ➤ Through the diversity project and targets, better acquaint ourselves with hard to reach groups such as part time and mature students. ➤ Need to strengthen the campaigning – increased role of officers in campaigning regarding local/campus issues. ➤ Strategy on relationship with members in partner institutions. ➤ Maximize use of existing representation channels – ensure we take our seat at the table where we have it. ➤ Increase dialogue regarding accommodation.

<i>1 - Increase the positive profile of students and their experience within the city and region - Good</i>
PROGRESS
<ul style="list-style-type: none"> ➤ LUSU Involve has continued to produce positive press regarding students' positive impact on the city and region. In particular, student projects in schools and green initiatives. ➤ Campaign work concerning fees has raised the profile of LUSU as an active Union positively fighting for students rights ➤ There has been ongoing work with the Police and licensing authorities concerning responsible behavior and drinking. The Sugarhouse secured the 'North West Best Bar None Award' for its best practice within the licensed trade industry. ➤ LUSU Living has continued to promote good student/resident relations has built strong relationships with the city housing authority and local landlords. ➤ Indicative survey work has been conducted to enable local planners to understand student perceptions of the city.
CHALLENGES TO PROGRESS OVER THE PERIOD
<ul style="list-style-type: none"> ➤ Officers and staff have continued to attend city town and gown meetings but the University's engagement has remained more limited. To ➤ A number of groups LUSU engages with are currently under review due to the CSR and local authority cuts. It is unclear going forward what liaison groups will remain, what the priorities will be and which people will remain to work in partnership with. The City Council Town and Gown Forum is about to be abolished.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION
<ul style="list-style-type: none"> ➤ Improve the depth and frequency of dialogue between LUSU and the City Council to ensure that students' views help shape agendas and developments within the city. ➤ Continue to work with the Chamber of Commerce where appropriate on initiatives such as the Purplecard and Student Friendlies, which directly benefit our members.

J - Engage with known and emergent national representation agendas - Good

PROGRESS
<ul style="list-style-type: none"> ➤ Lancaster was at the forefront of campaigning in the recurrent national actions on Tuition fees & university funding. ➤ Introduced a more political angle to Winter Officer Conference and other officer training events. Both 2010 and 2011 have seen participation of the NUS President. ➤ Lancaster has been strongly involved in NUS training, campaigns, and events. ➤ Developed strong ties with students unions in the north west; working collaboratively on campaigns and initiatives. In particular UCLAN & UCUM. ➤ LUSU ran a highly successful campaign in the run up to the 2010 General Election to encourage students to vote.
CHALLENGES TO PROGRESS OVER THE PERIOD
<ul style="list-style-type: none"> ➤ Over the period, the Union has tried to become more engaged with the Unions '94 group to look at joint initiatives and to strengthen the power of the group's voice. The LUSU President held the chair of the organization in 2009-10 but no activity actually came into fruition. ➤ Internationalization and Faith ➤ NUS events often cater to SU's that are the lowest common denominator; discouraging Lancaster involvement in sessions that are considered as of little value. The political direction of the NUS's constituent members is often at odds with that of LUSU. There is a question about the worth of the relationship.
FUTURE IMPLEMENTATION REQUIRED/DIRECTION
<ul style="list-style-type: none"> ➤ Ensure relationships last longer than individual officerships by formalizing interactions ➤ Need to continue to build strong partnerships with local members of the NUS such as UCUM and UCLAN.

Be Sustainable

K- Ensure that financial, governance and planning processes are fit for purpose and legally compliant - Good

PROGRESS
<ul style="list-style-type: none"> ➤ The processes to enable LUSU to register as a Charity have been completed. This included a constitutional review and amendments, alterations to the balance of the

<p>Trustee Board Structure and some electoral reform within the JCR system. LUSU registered as a charity with the Charity Commission on 27 October 2010.</p> <ul style="list-style-type: none"> ➤ New formats for the risk register have been introduced which broadly follow the University's approach and these are reviewed on a quarterly basis. There is a general consensus that the register is more effective. ➤ Scenario planning has been introduced ➤ The Code of Practice between LU and LUSU is currently under review ➤ There has been a more rigorous analysis of performance and budgets. This has enabled a bottom up approach when developing future budgetary projections. ➤ Specialist advice and guidance has been sought with regard to VAT status. This has allowed financial results for 2009-2010 to be maximized. ➤ Company structures and articles have been updated and a new LUSU Housing Ltd created to ensure companies are fit for purpose and effective.
CHALLENGES TO PROGRESS OVER THE PERIOD
<ul style="list-style-type: none"> ➤ With the Comprehensive Spending Review in November and internal reviews of all central services within the University underway, it is still too early to ascertain the full impacts
FUTURE IMPLEMENTATION REQUIRED/DIRECTION
<ul style="list-style-type: none"> ➤ Aim to scenario plan for a longer window +2yrs. ➤ Re visit LUSU's reserve's policy to ensure that the organization has capital to plan for the future.

<i>L - Stabilize and where viable grow existing income streams – Good</i>
PROGRESS
<ul style="list-style-type: none"> ➤ Operationally maximized financial results and have achieved a record surplus in 2009/10 ➤ Since 2009 LUSU has been fortunate to be able to secure a baseline increase to its block grant. ➤ Management information has been improved: there have been moves to produce weekly reports and management information has been introduced for the purplecard.
CHALLENGES TO PROGRESS OVER THE PERIOD
<ul style="list-style-type: none"> ➤ As per L, it is still too early to ascertain the full impacts of the CSR on the University but LUSU has had to and will need to continue to compete with other parts of LU to maintain its share of resource in the shape of the block grant. ➤ LUSU continues to deliver a diverse portfolio of services and activities, which are a challenge to manage. A number of students' unions have already simplified and divested themselves of certain commercial operations.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION
<ul style="list-style-type: none"> ➤ Undertake a treasury management process review to improve on the interest deliverable on LUSU's funds. ➤ Continue to strongly negotiate with LU regarding the block grant position. Baseline increases had been forecast but this was based upon the pre CSR environment. This could change. ➤ Need to carefully monitor any fallout from proposed legislative changes. ➤ Actively manage the external environment i.e. the University and its perception of our value in relation to the student experience to protect core funding.

M - Develop a diversity of funding streams - Good

PROGRESS
<ul style="list-style-type: none"> ➤ LUSU joined the NUS Students Union Fund Raising Cohort to share good practice and exploit opportunities to make joint bids (see section below). ➤ Funding has been secured from UPP to support campus events activity. ➤ Relationships have continued to be developed with LU Alumni to try and LUSU has continued to attract significant funding for one of events and activity groups from the Friends' Fund. ➤ LUSU Involve have been successful in acquiring funds to continue and extend their work from trust funds and other donors. These have included organizations such as the Britannia Foundation.
CHALLENGES TO PROGRESS OVER THE PERIOD
<ul style="list-style-type: none"> ➤ NUS Students Union Fund Raising Cohort has not delivered anything, which is disappointing.
FUTURE IMPLEMENTATION REQUIRED/DIRECTION
<ul style="list-style-type: none"> ➤ To create a rolling set of projects/ideas to attract funding for going forward which are on mission. ➤ Bids are being made to NUSSL's Innovation and Social Enterprise Academy for small, one off funding opportunities.

N - Improve service through maximizing current resources and new technological advances - Satisfactory

PROGRESS
<ul style="list-style-type: none"> ➤ There has been increased staff participation amongst NUSSL and AMSU working groups. This has included: NUS Critical Friends Group, NUS Services Staff Focus Group, the Business and Enterprise Committee, Joint Fund Raising Cohort and the Ethics and Environment Committee. This has been with a view to bringing new ideas and

approaches back to LUSU and shaping the national initiatives.

- A number of internal restructures have taken place to maximize staff resource. In particular, within the Finance and Involve teams. These changes have enabled more flexible working and improved member support and service. Cross functionality has been increased. Club and society accounts control have been devolved back out from the centre creating.
- Changes to LUSU Involve and finances all being brought underneath LUSU from August 1 2010, mean that activity is easy to administer.
- There have been changes made to the funding model for the JCRs, the PGSA and Cross Campus Officerships. This has made their finances more transparent.
- Wordpress and facebook have become central to the organization's web output. Twitter have been adopted by the student media, which has led to improved communication around key events.

CHALLENGES TO PROGRESS OVER THE PERIOD

- There have been high demands on IT resources over the period and IT driven service improvements have had to be tempered by this. Quality of delivery has also been compromised at times. A recent new staff appointment has bolstered ability to be able to deliver in this area. Approach to deployment of emergent technologies over the period has changed; adopting emergent technological advances was not sustainable or desirable. Therefore the IT Team have undertaken a major review of service and practices resulting in new, more effective working practices being adopted from Autumn 2010.
- Throughout the period, NUS and NUSSL have continued to try and reshape themselves into one single entity. Considerable progress has been made towards this but as yet, the benefits and impacts of these changes are to be felt.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION

- Other areas of LUSU to conduct reviews and restructures to maximize resource and effectiveness post CSR and Browne. These are namely retail and advice and representation services.
- Review and where appropriate adjust changes made to internal budget structures in 2009-10.
- Strategic aim is to now deploy appropriate technology and improve IT project planning and delivery.

O - Understand and where possible, limit the negative environmental and ethical impacts of our organization - Good

PROGRESS

- GreenLancaster activity has continued to grow and helped LUSU to improve its environmental and ethical performance. This has been recognized by the Union being

awarded the Gold Standard by the NUS in the Green Impact Awards (formerly Sound* Impact), one of only 5 Universities in the UK achieve this standard; and also being categorized as Highly Commended in the Green Gown Awards.

- Achieved representation on the LU Carbon Management Committee.
- Activity has been run within the University to install energy monitoring across 4 colleges' residences with volunteer carbon crusaders.
- Pilot recycling activity has been rolled out across campus through the recycling rangers and exodus project.
- LUSU has also undertaken ethical trading initiatives within retails and increased the range of ethical products.

CHALLENGES TO PROGRESS OVER THE PERIOD

- There is funding for GreenLancaster activity from LU until 31st March 2011. After this point there is a commitment to fund but as yet how much or where this funding is coming from is undefined.
- Post the Comprehensive Spending Review in November 2010 and changes to the carbon reduction commitment; the University has a vested interest in maintaining and growing such activity.

FUTURE IMPLEMENTATION REQUIRED/DIRECTION

- LUSU to secure funding for GreenLancaster from 2011 onwards.
- LU to aim to better highly commended, in the Green Gown awards.