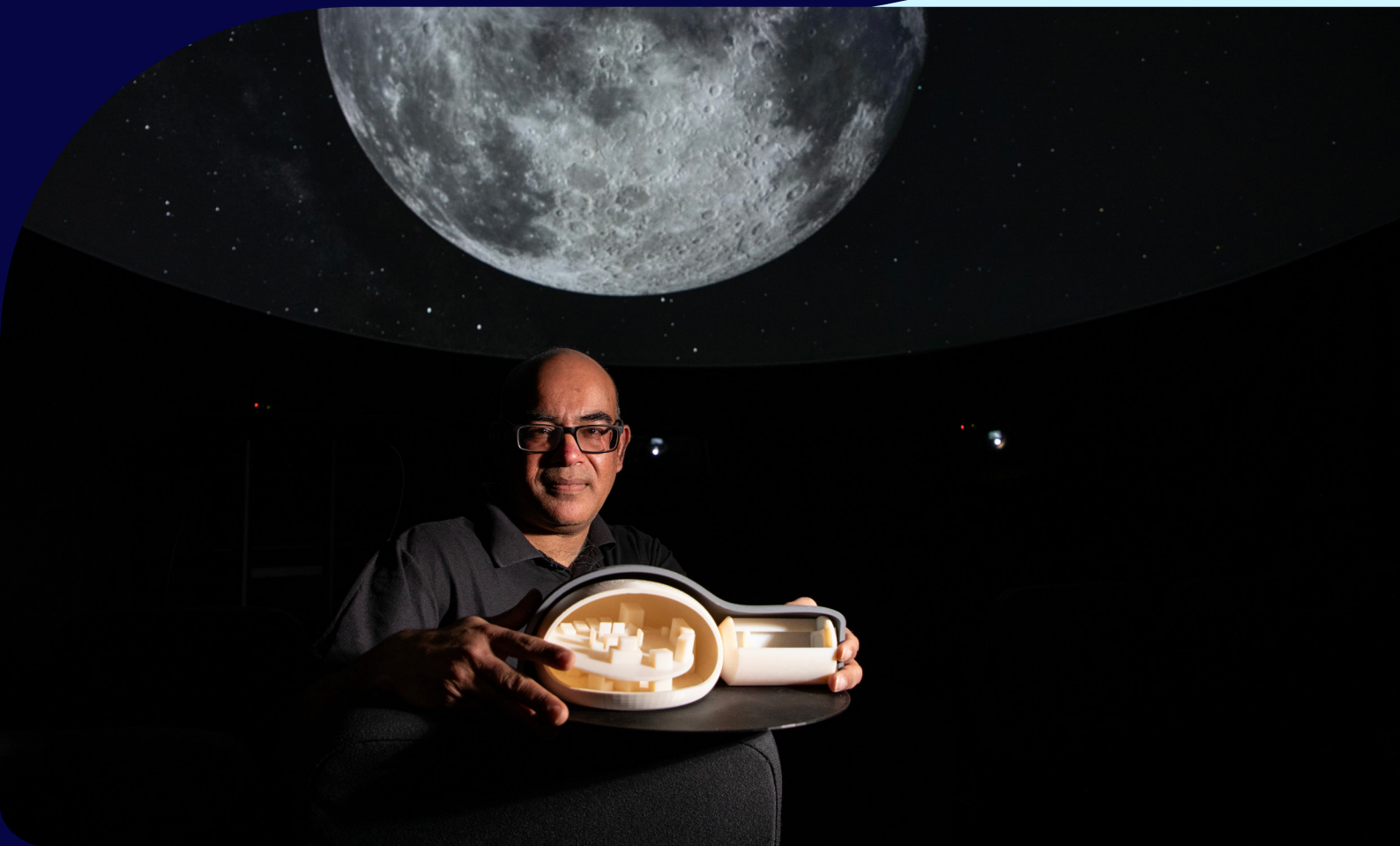


The Open University in Scotland **Knowledge Exchange and Innovation Strategy 2025 – 2030**





Artemis IV

ARTEMIS FIRSTS:

- Crewed mission to Gateway space station
- Launch, delivery, and integration of a Gateway module
- Crew transfer from Orion to human landing system (HLS) via Gateway
- Deep Space Logistics flight to Gateway

NEW ELEMENTS:

- Space Launch System rocket Block 1B configuration Mobile Launcher 2 with supporting ground systems
- SpaceX Sustaining Starship HLS
- Gateway modules: Power and Propulsion Element and Habitation and Logistics Outpost (pre-staged in orbit); International Habitat (launched on SLS Block 1B alongside the crew aboard Orion); Deep Space Logistics

COMMON ELEMENTS:

- Common SLS elements
- Orion crew spacecraft
- Spacesuits and support systems
- Conducting orbital and surface science and tech demos

Crewed Mission To Our
Lunar Space Station

Contents

Overview	4
Institutional context	4
Overview of strategic ambitions	4
Alignment to Scottish Government priorities	6
KE&I Capacity	7
Platform Grant	7
Overall capacity for KE&I	7
Outcome Grant activities	8
KE metric activity	8
Graduate start-ups and spinouts/Entrepreneurial Support	9
Wider KE&I activities	11
Wider Societal Impact	11
Collaboration	12
Regional approaches	13
Equality, Diversity and Inclusion	14
Embedding and promoting EDI	14
EIA	14
Promoting positive KE&I culture	15
Knowledge Exchange Concordat principles	16
Appendix: Equality Impact Assessment	18

Dr Lori Glaze, Acting Associate Administrator for NASA's Exploration Systems Development Mission Directorate, presenting at the European Lunar Symposium 2024 in Dumfries

Front Cover: Mahesh Anand, Professor of Planetary Science and Exploration, presenting his 'Living on the Moon' model at Kirkudbright Planetarium

Overview

Institutional context

The Open University in Scotland is the largest provider of part-time undergraduate higher education in Scotland, with over 19,000 students from the Shetland Isles to Dumfries and Galloway – a world leader in providing innovative and flexible distance learning opportunities and ranked first in Scotland for student satisfaction in the National Student Survey 2024. Widening access is central to our mission: more students come from Scotland’s most deprived communities than the least, 23% live in remote, rural, or island communities, and 30% share a disability. Notably, 42% of our undergraduate entrants are from SIMD 20 and 40 areas, with 19% in SIMD 20. Accessible education is at the heart of our identity as a university.

Bridging School, College and University

- **Our national schools programme bridges S6 pupils in all 32 local authorities to university study.**
- **We collaborate with Scotland’s other 18 higher education providers and have formal progression arrangements with 16 regional colleges, alongside shared teaching models.**
- **We are also an academic partner of the Crichton Campus in Dumfries.**


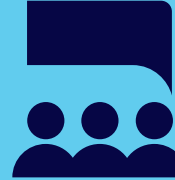
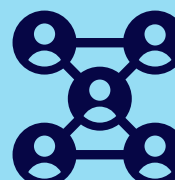

Aligned with Scotland’s priorities, we support economic and civic development by driving lifelong learning, upskilling, and reskilling in key sectors such as renewable energy, healthcare, and digital innovation. Our knowledge exchange approach emphasises collaboration with external organisations to co-create solutions to address societal and economic challenges, with our wide expertise spanning sustainable development, public policy, space technology, and digital transformation.

Recognised for our inclusive approach and high-quality research, this institution is a key driver of innovation and equity, supporting Scotland’s ambitions for a greener and fairer society.

Overview of strategic ambitions

Our strategy will advance our Knowledge Exchange and Impact (KE&I) plan over the next five years, aligning it with our mission and institutional ambitions. It will strengthen our commitment to addressing Scotland’s most critical challenges and ensures our research delivers meaningful societal and economic impact and benefit. Our KE&I mission fosters collaboration between our researchers and partners, including businesses, the Scottish Government, the third sector, and public and private organisations across Scotland. We aim to make our research accessible to broad, diverse audiences and address real-world challenges, including the climate emergency, living and ageing well, and tackling inequalities. Institutional priorities in KE&I are reflected in our flagship Open Societal Challenges programme, aligned with the Scottish Government’s key priorities to tackle Scotland’s key social, environmental, and economic challenges.

Broad areas include:

	Collaborative Research and KE Expanding engaged research and partnerships to address pressing issues in Scottish society, business, and industry. Often this means working alongside other organisations where we are a contributory specialist.
	Public and Civic Engagement Offering bespoke resources, training, and development opportunities for educators, professionals, and the wider public across Scotland on contemporary themes, that our audiences want to be better informed in e.g. climate change, wellbeing and early years education.
	Knowledge Transfer Exchanging knowledge, best practice, and innovations between our academic experts and external stakeholders, often addressing challenges in situ.
	Impactful Outcomes Ensuring research and KE activities deliver tangible benefits, such as improved policies, use of technologies, and better practices.

Alignment to Scottish Government priorities

Our KEIF strategy resonates strongly with key messages in the National Strategy for Economic Transformation. It will directly and indirectly help drive economic growth, informed by principles including inclusivity, sustainability and resilience, echoed across much of Scotland’s current policy landscape.

It also aligns with many aspirations in the Scottish Government’s Programme for Government 2025–26. For example, our strategy supports the development of an “innovation nation” – backing tech innovation, entrepreneurship and economic growth. Our plans to deepen our contribution to the wider Scottish economic ecosystem run in parallel with government policy.

The KEIF strategy supports a dynamic, diversified economy benefiting individuals and regions across Scotland, and aligns with the OU’s mission to be open to people regardless of location, circumstances, or prior educational attainment.

It also dovetails with Scotland’s National Innovation Strategy, where collaboration, creativity and innovative models are central to our mission and vision.

Our approach also supports wider Scottish Government priorities including tackling climate change, reducing inequalities, and improving health and wellbeing.

To enable a coherent, aligned contribution, we will:

			
Become a more visible and influential partner in the innovation ecosystem, bringing our unique voice and being part of a “Team Scotland” solution.	Work collaboratively across the tertiary sector, with business and industry, and where appropriate, take a progressive lead.	Forge new partnerships and instigate innovative collaborations to contribute to key government priorities.	Through our distinctive delivery model, contribute as a premium provider in driving education and skills aligned to Scotland’s economic needs in an evolving labour market.

KE&I Capacity

Platform Grant

The Platform Grant will support our infrastructure, including core staffing and a development budget. We will match fund it in-kind. Other University units will contribute to our strategy – the central Research and Enterprise team will support commercial knowledge transfer and collaborative bid development. They will also assist with impact evaluation, and KE&I staff development and training to expand our capabilities and capacity. Additionally, they will support data mining, particularly around KEIF metrics, and ongoing self-evaluation to review performance and enable year-on-year growth.

Additional Open University units supporting our wider strategic KEIF ambitions include:

- PolicyWISE, our four-nations comparative policy, research and knowledge exchange project, will enhance our work with Scottish policymakers and increase our delivery capacity.
- Marketing and Communications teams in Scotland and UK-wide will help tell a compelling story, pursue media opportunities, and communicate our impact to diverse audiences.

The Scottish Funding Council’s contribution is imperative. It supports core staffing and provides a revenue budget for activity delivery within our five-year strategy. It is fundamental to our ambitions and provides a springboard for a comprehensive KE&I service across Scotland.

A joint commitment from the Scottish Funding Council and The Open University in Scotland increases financial stability, attracts partners, and makes planning more sustainable. Working together creates synergy – combining networks, skills and resources to amplify reach and impact in Scotland’s knowledge exchange and innovation environment.

Overall capacity for KE&I

Two members of Open University in Scotland staff (2.0 FTE) are directly supported by KEIF. Across The Open University, there are approximately 30 members of staff who have KE&I as a significant part of their role. There is also a 1 FTE commercial knowledge exchange manager employed through our central campus, with 0.5 of their time focused on developing KE&I activity across all four UK nations.

Outcome Grant activities

KE metric activity

Our KEIF strategy metrics, and forecast data are predicated on building our capacity to deliver on our aspirations over the next 5 years. There are however several unknowns that ultimately will determine the finer details of how our strategy will evolve. As a result, we anticipate that it will need on-going finer tuning, including annual revision as part of our review and self-evaluation process and in line with any policy changes

We will concentrate our efforts in KEIF metric areas that will have maximum impact against the time invested. Additionally, some of the KEIF metrics will not receive the same attention as others, as we intend to focus on our key institutional strengths.

Our ambitions in terms of the KEIF metrics, include year on year growth of 5%, (in the prioritised metrics)

Specifically, our focus includes:



Student Entrepreneurship

We are committed to growing the number of student entrepreneurs at The Open University in Scotland. As part of our KEIF strategy, we will dedicate staff time to developing our programmes, working alongside our Research and Enterprise colleagues to ensure effective delivery. A key strand of this work is Open Business Creators – a new programme designed to support entrepreneurial journeys from early curiosity to serious business development. It will offer mentoring and, where possible, financial support to help students take their ideas forward, including access to internal OU funding competitions supported by gifts and corporate donations.



Consultancy Opportunities

We aim to grow our consultancy work with business and industry as a core part of our knowledge exchange activity. To support this, we've recently updated our internal policies and introduced new processes that allow for more direct service delivery. These improvements will strengthen our ability to engage with partners and clients, and help us expand our commercial and income-generating potential. We will continue to work closely with relevant teams to align consultancy activity with wider university goals and sector needs, building visibility and capability in this area across Scotland.



Upskilling and Reskilling

Upskilling and reskilling through Continuing Professional Development (CPD) is another strategic priority, particularly where it addresses skills gaps and workforce development. Our partnership with Unison demonstrates how CPD can provide real value to learners and employers alike. With our flexible delivery model and career-focused curriculum – including industry-informed microcredentials – we are well-placed to respond to the evolving needs of the workplace. We believe this area offers strong growth potential across the full term of the strategy, especially where it supports economic recovery and social mobility.

These three areas will be the priority focal points in the early years of the strategy, as we aim to increase our metrics return.

Although not currently part of the KEIF metrics, we are keen to contribute to an on-going dialogue around additional measures that are important to widen societal engagement where there are less well-defined indicators of impact. For example, as part of our strategy, we aim to develop a public and civic engagement guide that will help to develop more meaningful and robust success indicators.

We believe our metrics are achievable over the full term of our strategy. They are informed by consultation, emerging intelligence from Scotland based survey work, and experience garnered from other Open University colleagues across the UK.

Graduate start-ups and spinouts/ Entrepreneurial Support

Over the next five years, we aim to significantly increase the number of student entrepreneurs starting businesses. Our insight research highlights a unique opportunity to grow our entrepreneurial community. Going forward, we have a plan to maximise potential, with a range of new approaches.

With over 70% of our students already in the workplace, many with entrepreneurial potential, we believe we can harness this opportunity. Additionally, our diverse demographic enables us to support students from remote and rural locations, those with protected characteristics or disabilities, and under-represented groups such as women, in their entrepreneurial journeys. The Open University in Scotland can play a very particular role in the entrepreneurial ecosystem, supporting a new demographic of under-represented entrepreneurs.



RBS Female Entrepreneurship Award winner, Laura Ripley.

Entrepreneurial spirit

OU student Laura Ripley from Aberdeenshire won the Royal Bank of Scotland Female Entrepreneurship Award in the Converge Challenge 2023. Her business, Northern Frights, delivers immersive horror and fantasy events across the North of Scotland, using props, special effects, and skilled actors to bring unique experiences to life.

Laura left school at 15 but later returned to education through the Open University, studying subjects like Design, Business, and Creative Writing to support her entrepreneurial journey. Judges praised her resilience, vision, and determination to break into a male-dominated industry with a scalable and ambitious business model. They described her as a true role model, championing diversity and inclusion and embodying the entrepreneurial spirit at the heart of the award.

To achieve this, we have/will:

1. Recruited Russell Dalglish as Entrepreneur in Residence to act as a catalyst and “critical friend,” supporting our goals to create more successful entrepreneurs. This will enable us to develop a range of high-quality networking opportunities, peer to peer learning events and generally position us as a key and credible provider.
2. Conduct a full assessment of student entrepreneurs’ needs to tailor support effectively. In the first year of our strategy, we will do a deep dive analysis of what interventions would be most helpful to usefully inform our subsequent activities.
3. Develop in-person and online sessions for students with early-stage ideas, offering direct support and mentoring. We will actively promote the sessions to under-represented groups, as part of our mission to be open to all regardless of their location or personal circumstances.
4. Provide wide ranging networking opportunities for students to share ideas, problem solve and build our entrepreneurial community.
5. Leverage our digital platforms and entrepreneurial education expertise to enhance reach and impact.
6. Collaborate with enterprise-focused organisations like Converge to explore synergies and enhance the student experience. We are also a Pathway Pledge organisation and are committed to nurturing female entrepreneurship and growing the number of female founders in business.
7. Help students access resources and funding via our Open Business Creators programme, which will also provide access to a range of related learning opportunities to support establishing a new business.
8. Develop proof-of-concept programmes, such as our collaboration with Scotland’s Rural College to support student cohorts and contribute to the entrepreneurial campus blueprint as part of a cohesive approach.
9. Build an innovative support model for freelancers and sole traders, assisted by our Entrepreneur in Residence.
10. Target regions and demographics with low participation rates and addressing gaps where traditional support models have not been effective. We believe we can bring a very distinct contribution, given our wider experience of reach, and supporting students experiencing adversity.
11. Implement annual reviews of impact and outcomes, including EDI indicators to ensure equality and diversity are at the centre.
12. Ensure our strategy aligns with Scottish Government priorities, extending innovation and support across Scotland’s communities.



The Open University in Scotland and Codebase work in partnership to accelerate co-learning opportunities and drive startup and entrepreneurial activity

Wider KE&I activities

Wider Societal Impact

Wider societal impact is a unique strength at The Open University in Scotland, and we aim to expand our activities in this area, as our strategy evolves. Our civic mission informs our audiences on contemporary issues through online and face-to-face events, as well as OpenLearn and OpenLearn Scotland, our free, accessible and hugely popular digital platforms. In 2023/24, over 165,000 unique visitors accessed OpenLearn from Scotland. OpenLearn provides free resources ranging from bitesize learning to co-created online courses with partners like Cisco. Many resources address critical themes in Scotland including climate adaptation, personal finance, mental health, and carers’ support, aligning with Scottish Government priorities in areas such as net zero and health and social care. Many of the resources have been co-written with partners in Scotland. It is the largest university-owned platform offering cross-faculty learning to the public and is fully accessible across a range of devices e.g. smartphones.

Our long-standing partnership with the BBC combines expertise to produce innovative content, reaching Scotland’s widest audiences. Co-produced programmes include The State We’re In, a current exploration of our public services, and The Women Who Changed Modern Scotland, highlighting women’s influence on Scottish history. BBC collaborations amplify societal challenges, as seen with The Blue Planet, which spurred policy action on plastics. In 2023, Planet Earth 3 drew over 10.6 million UK viewers for its first episode. As part of our KEIF strategy, we will promote our BBC offer and expand engagement through extension activities, to further increase our reach.

We will also grow public engagement across Scotland, hosting an array of events featuring our academics and other world leading experts.

Our comparative policy think tank, PolicyWISE, enables policymakers to assess and contrast policies across UK jurisdictions, and we will enhance its impact over the coming five years, engaging extensively with the policymaking community in Scotland.

Our Centre for Protecting Women Online, Europe’s first research centre addressing online violence against women and girls, works with governments, regulators, and social media platforms to tackle inequality and digital abuse through law, policy, and education. There will be specific activity and output in Scotland as part of the Centre’s work.

As part of our work to build our research active community in Scotland, we will also explore opportunities for more placed based KE&I activity, especially in communities that could benefit from our support.

The flagship Open Societal Challenges programme takes a challenge-led approach, tackling major societal issues focused on sustainability, inequality and living well, through collaboration between our researchers and local partners. Open University specialists and partners form teams to address specific challenges, locally or regionally – aligned to the priority themes. Current projects across Scotland address issues including heritage greenspace development, reproductive injustice for women with learning disabilities, and promoting social inclusion. We plan to expand this initiative as our KEIF strategy progresses. A key aspect of this programme is the ideation and co-production of ideas, driven by local partners faced with complex challenges, that we can assist them in addressing.

Collaboration

The Open University in Scotland views collaboration within the sector and with partners as essential in realising its aspirations and adding value to programmes and projects. We recognise that working together will lead to greater impact and a more cohesive approach in the KE&I landscape.

Collaboration will be central to our ambitions, and we will work with the existing SFC-supported infrastructure and across the sector as part of an integrated approach, maximising synergies for greater impact.

We will:

1. Explore opportunities to collaborate with the Innovation Centres. Initially, we plan to engage specifically with IBiolC and the DataLab and have already embarked on early conversations to map out some potential future opportunities to work together, where there is mutual benefit. For example, there are immediate opportunities to showcase our capabilities and expertise to the members and networks of the Innovation Centres. Early in the strategy, we will endeavour to strengthen our links and visibility in this space (especially with IBiolC and the DataLab) to build credible relationships.
2. As members of Converge, we will avail of their services to assist in our plans to encourage entrepreneurship among Open University Students. We plan to collaborate from the early stages of our KEIF strategy, including contributing to student workshops, developing their skills and providing support through our Open Business Creators programme.
3. Our Open Societal Challenges programme is a mechanism for collaboration with non-academic organisations and we will continue to use it to pump prime collaborative research.
4. We will further explore opportunities for industry collaborations, engaging with Interface to seek out ways where our expertise could be matched, to support businesses in addressing their challenges. Our approach so far has been to target sectors where we have expertise. In 2024 we hosted the European Lunar Symposium in Dumfries to promote our researchers' work on lunar science to the global community and exhibited at the SpaceComm expo in Glasgow to demonstrate innovative solutions developed by Open University researchers to companies in the space exploration supply chain. This is linked to broader plans to commercialise our innovations going forward.
5. We will collaborate across the sector, to bring our unique skills and expertise to new partnerships. We are also exploring opportunities to work across the sector, in specific areas e.g. entrepreneurship. Additionally, we will work with the KEIF collaboration manager as part of an integrated approach across the HE landscape generally, in a wider effort to ensure that the sector is more than the sum of its parts.
6. The Open University in Scotland has a unique role to play in driving collaborative efforts, with a successful track record on leading multi-interest projects. With a distinct approach, we are viewed as a trusted and impartial provider who can bring people and institutions together for the greater good. As a Scotland-wide provider, we are well connected externally in terms of collaborations and partners, and where appropriate, could involve our other strategic partners to contribute to the broader aspirations of the KEIF.

The Open University in Scotland has a long-term partnership with Crichton Campus in Dumfries where the European Lunar Symposium 2024 was hosted

Regional approaches

As a Scotland wide provider, we have strong connections across the whole country, responding to opportunities where we can make a distinct contribution.

Although we are not funded partners in City Region and Growth Deals, we have provided services in deal localities e.g. Glasgow, Aberdeen and Edinburgh. This includes upskilling and reskilling the workforce through industry-standard microcredentials and workplace learning opportunities. As part of our KEIF strategy, we aim to deepen relationships in this area.

We maintain partnerships with all of Scotland's 16 regional colleges, creating opportunities for collaboration in KE&I. Given the place-based regional nature and networks in colleges, together we can support SMEs with their learning and development needs and to help address skills shortages such as those in digital and IT, health and social care and environmental management. Our distance learning infrastructure enables us to provide specialised skills training not currently offered by the college sector.

We are a valued partner on the Crichton Campus in Dumfries, contributing KE&I services. Examples have included supporting plans for an inter-generational care campus, delivering workshops on autism, dementia, social isolation and mental health, with recent projects addressing themes including sustainability, community leadership and Artificial Intelligence. Our work in the region has led to many other fruitful partnerships, maintaining strong relations with South of Scotland Enterprise, the local authority and many other local organisations.

At a regional level, we will focus on activities in the South of Scotland, as a key part of our rural approach to KE&I.



Equality, Diversity and Inclusion

Embedding and promoting EDI

Equality, diversity and inclusion are at the heart of all that we do as an institution. As an innovative, inclusive university, we are self-reflective and committed to improving our EDI practices in our KE&I work.

Since our early beginnings, we have promoted educational opportunity and social justice by providing high-quality education to all those who wish to fulfil their potential. Those values underpin our KE&I practices and are embedded throughout our work, including:

- Developing relevant EDI policies within our KE&I programme and planning cycle.
- Providing staff with EDI training to build awareness and foster an inclusive and diverse culture.
- Cultivating an open KE&I culture where behaviours and practices can be constructively challenged, with remedial action taken as required.
- Acting as ambassadors and EDI role models to positively influence our partners and collaborators.
- Encouraging ancillary organisations supporting our KE&I work to adopt inclusive practices.
- On-going monitoring of our activities through an EDI lens to ensure compliance with the Equality Act (2010).
- Systematically review our KE&I practices, following best practice and making revisions based on feedback.
- Ensuring inclusive and accessible promotion of KE&I activities and collaborating with equality organisations to enhance practices, particularly for groups with protected characteristics.
- Consulting with Open University in Scotland staff directly involved in KE&I activities.

National EDI measures in our KE&I work may include:

- Monitoring participant demographics in our KE&I activities.
- Conducting on-going diversity audits of staff involved in KE&I to ensure broad participation.
- Pro-actively challenge our annual returns to seek year on year EDI improvements.



EIA

An Equality Impact Assessment has been undertaken, and developed in consultation, including with our EDI specialist team.

KE&I Culture

Promoting positive KE&I culture

We will continue to build a positive KE&I culture nurturing an environment that fosters mutual respect, inclusivity, collaboration, autonomy and teamworking.

Enabling factors include:

- Inductions for all staff involved in KE&I activities, and training/workshops reflected in our Knowledge Exchange Implementation Plan.
- Developing opportunities and development pathways for staff involved in KE&I.
- Building a sense of purpose, and a community of belonging for Open University staff directly involved in KE&I.
- Encouraging a culture of openness and constructive dissent, where disagreements are managed with respect, and ideas can be positively challenged and seen as an opportunity for learning.
- Modelling an Inclusive Leadership approach (at all levels) in our KE&I plans and activities where KE&I colleagues feel valued, included and listened to.
- Build high trust relationships within the team who deliver on KE&I.
- Celebrate and share our successes internally and externally.
- Foster integration with counterpart colleagues across the Open University's other national KE&I departments.

Measures to assess our progress include:



KE&I staff surveys and focus groups related to culture and climate (including cultural and climate indicators) e.g. staff engagement levels, numbers of KE&I collaborations and staff retention on programmes.



Growth in KE&I activity

Knowledge Exchange Concordat principles

The Open University is fully committed and signed up to the principles of the Knowledge Exchange Concordat, with an accompanying action plan. Aligned to the Concordat, we work collaboratively across the sector and with employers and partners, sharing and learning from best practice.

The Open University in Scotland is a unique and distinct higher education provider. With a flexible, inclusive, and accessible approach, our reach and mission are unrivalled. Our KE&I services are available across the whole of Scotland, and we have expertise at providing high quality support to organisations at a distance and at scale. Additionally, we are well networked with connections and mature partnerships, dispersed across Scotland. We are viewed as a trusted provider, who works with organisations, to co-design solutions addressing their challenges.

As a specialist in widening access, we also bring that perspective in developing inclusive approaches to our KE&I activities.

Additionally, as a non-campus-based provider, we bring a distinguishable vantage point, and voice to collaborations within and out with the sector.

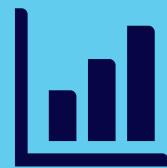
We have notable strengths supporting remote and rural geographies, working with disenfranchised and marginalised groups, and using our digital platforms to maximise reach and participation in Scotland.

Uniquely, we are a 4 Nations university, with cross-capabilities across the whole of the UK. Effectively this means there is considerable world-leading expertise we can draw upon from the whole institution to directly support our KE&I work in Scotland.

Benefits of being part of a 4 Nations university include:



Shared learning and drawing on best practice from across the Nations in The Open University in Scotland, enriching our approach to KE&I.



Greater impact because we can pool data, and better evidence the efficacy of interventions from across the Nations. For example, we are exploring how we might do that in our public engagement and civic society work across the 4 nations.



Although we have our own distinct operating landscape at The Open University in Scotland, being part of a UK wide university, brings additional benefits in terms of capabilities, available expertise and access to national networks.



Our overall contribution in the KE&I landscape is unique, with the subtleties of our contribution not necessarily captured through the current metrics.



COP 26 event, The return of Totem Latamat to the Earth

Classification: Public

Equality Impact Assessment

Prepared for the Scottish Funding Council: Knowledge Exchange and Innovation Fund (KEIF) 5-year strategy

The Open University in Scotland

Name of the policy/project:

Knowledge Exchange and Innovation Fund (KEIF) 5-year strategy document.

1. Describe the purpose/aim of the policy/project?
All Scottish Higher Education Institute’s (HEIs) are required by the Scottish Funding Council to produce a 5-year strategy in relation to the new Knowledge Exchange and Innovation Fund (KEIF), which funds Knowledge Exchange (KE) and Innovation (I) activity across HEIs in Scotland. The funding from the KEIF will allow us to continue our KE&I programme – finding practical applications in Scotland for our engaged research, supporting innovation with business and industry, developing Scotland’s student entrepreneurs, delivering a public engagement programme and supporting internal KE&I projects and all related activities.
2. How many people are likely to be impacted and what category of people will be affected? (e.g., staff, students, contractors, alumni, partners, visitors, public)
The KEIF 5-year strategy supports the delivery of The Open University’s 4 Nations Knowledge Exchange plan (2022–2027). All research active academics across the wider university that carry out KE activities (c. 250 staff) will be affected as they may contribute towards KE&I activities in Scotland. In addition, KE&I staff in

Scotland will be affected directly, as the KEIF informs their annual budget and plans – and variations in the funding allocation from the KEIF would mean annual planning would have to be revised accordingly (no risk to job loss or amendments to role descriptions/responsibilities). Externally, staff and stakeholders of partner organisations, or members of the public who use the KE&I teams services could also be affected e.g. if services were reduced, then reaching a broad and diverse demographic could be challenging and impacted. However, there would be no loss on economic opportunity, rather there may be minor limitations on opportunities to attend events, etc.

In total around 270 staff members across the university, would be affected by the allocation of the KEIF as it will inform the budget available for KE&I activities across Scotland. The Open University’s student body will be unaffected.

3. What is the proposed implementation date?
31/01/2025
4. Is it a new or revised policy/project?
New project. The funding we receive replaces the University Innovation Fund, the previous fund for KE&I activity across Scotland.
5. How does the policy/project relate to other University strategic priorities or programmes and/or external organisations?
The KEIF Strategy supports the KE plan, and the Research plan (2022–27), which in turn supports delivery of the over-arching Open University Live and Learn Strategy (2022–2027)

Projects/policies involving public or student services in Northern Ireland, Scotland and Wales

6. Does your project/policy involve any public or student services delivered in Wales?

Please type yes or no here: **No**

7. Could the implementation of this policy/project have implications for Northern Ireland or Scotland?

Please type yes or no here: **Yes**

If yes, please give details and say how any issues will be managed here:

Issues won't need to be additionally managed, because the entire plan is designed for the Scottish context, so all contextual nuances associated with the Scottish system will be considered throughout.

8. Does this policy/project have any implications for students unable to study in the way that the curriculum/service is designed?

- Access to learning (e.g., can only study from the secure curriculum or has read only access to module materials);
- Other University services for students in prisons, secure units, hospitals or in the community under licence, (i.e., studying with limited or no access to the OU's signed in websites and services); or students who do not have Internet access.

Please type yes or no here: **No**

If yes, please give details and say how these implications will be managed or mitigated here: **N/A**

Stage 2: Decide how much the policy/project impacts on people

Consider the level of impact (i.e., marked effect or influence) the policy/project is likely to have on people, e.g., students, staff, alumni, contractors, partners and the public.

Equality Relevance

The grid below shows that the impact of a project or policy is determined by considering the number of people affected, along with the type of effect, i.e., whether it has significant, some, or limited effect.

	Significant effect	Some effect	Limited effect
Many people affected	Major	Major	Minor
Smaller number of people affected	Major	Minor	None

Please indicate whether the impact of your change is major, minor or none: **Minor – impacts many people in a limited way.**

Stage 3: Gather evidence and consult with relevant stakeholders

Please complete all the questions below in relation to your policy/project:

1. What existing Open University information/data informs this analysis? For each data source, state which protected characteristics there is data for.

Informed by another internal approved EIA associated with the Open University Knowledge Exchange Plan (2022–27).

2. What external sources of information/data informs this analysis?

N/A

3. What consultation is planned/has already taken place to inform this analysis?

The KEIF 5-year strategy aims to increase engagement in KE&I activities across Scotland.

So far, consultation has included discussions with The Open University in Scotland's Senior Management Team (SMT) and our data planning team as well as the central Open University Research and Enterprise team and our EDI team, as well as more informal consultation with various academics and university stakeholders. Additionally, the Open University's Knowledge Exchange Board have also been informed and consulted. Consulting these stakeholders confirmed and solidified our approach in designing the 5-year strategy and keeping meaningful EDI measures at the core of it. We also drew from the Knowledge Exchange plan (2022–27) and its supporting documents.

Moving forward, baseline data on staff either engaging or supporting KE&I activity will be collected on an annual basis. Data collected will focus on protected characteristics determined in Stage 4 as being of relevance to KE&I.

The method of collection and analysis will be developed in partnership with the EDI office and baselined against institutional employment data (e.g. a short anonymous survey). Where a group representing a protected characteristic is deemed as being under-represented, the KE&I team will engage with staff networks (e.g. BME Staff Network, Enabling Staff @ The Open University, Women @ The Open University, Open University in Scotland LGBT Staff Network) to determine a course of action to increase engagement.

Stage 4: Identify impacts and mitigating actions that promote equality and good relations

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
Age	N/A	N/A	N/A	N/A
Disability: <ul style="list-style-type: none">– physical (mobility, restricted manual skills etc.)– mental health issues– sensory difficulties (visual, hearing)	<ul style="list-style-type: none">• If staff or external contributors have a disability, some software packages or non-Open University developed	<ul style="list-style-type: none">• Standard templates in MS packages will be used, which are accessibility tested. Word should be used for documents instead of PDFs given the	The opportunity to fully participate in KE&I activities across Scotland and not be limited by disability.	The number of academics engaging in KE&I at The Open University in Scotland is increasing. Through addressing this characteristic, we will demonstrate that

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
<ul style="list-style-type: none">– neurodiversity (autism, dyslexia, ADHD, etc.)– invisible disabilities (multiple sclerosis, cancer, diabetes etc.)	<p>templates may not use suitable platforms with which to communicate in meetings or to prepare written documents.</p> <ul style="list-style-type: none">• If academics have a disability, they may not be able to access The Open University in Scotland’s	<p>enhanced screen reading capabilities in MS. All parties involved will be able to contact the meeting organiser/the person requesting a written document if the software package or templates used within a selected package are unsuitable. The</p>		disability is not a barrier to engaging.

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
	<p>offices, or specific rooms within the office for meetings, workshops or other events if these spaces are not accessible or allow for assistive technologies.</p> <ul style="list-style-type: none">• Change can be challenging for everyone. For the KE&I staff members whose roles will	<p>organiser/person requesting the document will then liaise with the parties to identify a package / template that is both suitable and will allow the meeting / report to be successfully undertaken.</p> <ul style="list-style-type: none">• Options for meetings will include in-person		

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
	<p>be affected, this may create additional pressures that could potentially have an impact on their wellbeing, particularly if it results in an increased workload.</p>	<p>meetings, Teams meetings and written correspondence.</p> <ul style="list-style-type: none">• Regular one to one meetings and support sessions to monitor workload.• Where in person meetings take place, the organiser will ensure the location and timing of the meeting is		

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
		<p>appropriate and accessible.</p> <ul style="list-style-type: none">• Where a report is required, options may include verbal reports and written reports using appropriate fonts etc.• It will be stipulated that all written correspondence by all parties involved should use software		

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
		<p>that is accessible to screen readers.</p> <ul style="list-style-type: none">• The Open University in Scotland is moving to a new office (exp. early 2026) which will have greater accessibility features than the current office.		
Gender Reassignment	N/A	N/A	N/A	N/A

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
(also known as Gender Affirmation/ Gender Confirmation/Being Transgender)				
Marital or Civil Partnership Status	N/A	N/A	N/A	N/A
Pregnancy or Maternity (includes adoption)	<ul style="list-style-type: none">If staff are pregnant or have maternity responsibilities, they may not be able to attend meetings at specific times	<ul style="list-style-type: none">The project leads will discuss with the staff member the mechanism by which they would like to interact with the other parties,	The opportunity to engage in KE&I activities across Scotland and not be limited by pregnancy or maternity.	Through addressing this characteristic, we will demonstrate that pregnancy and maternity are not necessarily barriers to engaging in KE.

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
	or in specific locations. There may also be an implication on the timeline of work (e.g. KE&I projects can take several months which may run into maternity leave).	and how this may change over time. Options will include in-person meetings, Teams meetings. <ul style="list-style-type: none">Where time is an unavoidable limiting factor, the project lead will discuss with the member of staff options for a stand-in or		

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
		<p>replacement for their role.</p> <ul style="list-style-type: none">• The project lead will discuss with the member of staff the most suitable time for meetings and ensure flexibility to account for appointments/ feeding/sickness• Where in person meetings take place the project lead will ensure the location and		

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
		<p>timing of the meeting is appropriate and accessible.</p> <ul style="list-style-type: none">• Where necessary and time is not a limiting factor the project lead will temporarily pause the project to account for pregnancy and maternity leave.		

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
Race (including Ethnicity)	N/A	N/A	N/A	N/A
Religion or Belief	Staff celebrating particular religious celebration days or holy events may be unable to engage with new research activities if dates clash, particularly if the research events are one day only events.	Scheduling of research events will be appropriately planned ahead of time to ensure minimal crossover with religious and cultural events.	Making it easy for participants of all religious and cultural backgrounds to take part in research, KE&I projects enrich the process and outcomes through consulting a wider range of perspectives and experiences.	‘Baked in’ inclusion policies in public facing academic projects contribute to increased cultural equity in society.

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
Sex (all gender identities, including non-binary)	N/A	N/A	N/A	N/A
Sexual Orientation	N/A	N/A	N/A	N/A
Other considerations				
Caring and dependants	Members of staff who have caring responsibilities may not be able to attend meetings at specific times or in specific locations or engage with specific research events.	<ul style="list-style-type: none">The project lead will discuss with the member of staff the most suitable time for meetings and ensure flexibility to account for caring responsibilities	The opportunity to engage in KE&I activities and not be limited by caring responsibilities.	There are significant societal barriers that make it more difficult for those with caring responsibilities to engage in KE&I activities. Through addressing this characteristic, we will demonstrate that

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
		and appointments. <ul style="list-style-type: none">Where in person meetings take place the project lead will ensure there is flexibility in the timing of the meeting.		caring is not necessarily a barrier to engaging in KE&I.
Political Opinion (For policy/projects affecting people in Northern Ireland)	N/A	N/A	N/A	N/A

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
Socio-economic Background	Public engagement events can often prove prohibitively expensive for those from disadvantaged and under-represented groups. A high-ticket cost could exclude members of the public from benefitting from the educational experience.	Tickets to public engagement events will never be excessively priced. Many will be free to attend. Ticket prices will always only be set to cover venue and running costs etc. and for tickets on the higher end of this scale further mitigations can be put in place – for example a certain number of free tickets being offered.	The opportunity for those from disadvantaged and under-represented groups to take part in stimulating public engagement events and help to democratise fields of study.	Promote the idea that high quality academic education should be available for all regardless of socio-economic background or circumstance.

Protected Characteristic	Adverse impacts	Mitigation for any adverse impacts	Positive impacts to address under-representation/ disadvantages/ meet different needs	Positive impacts to tackle prejudice or promote understanding
Is there evidence of the potential for intersectional discrimination (of two or more protected characteristics)?	We are aware of the potential of intersectional discrimination due to staff and the public holding more than one protected characteristic. This will be mitigated by the identified individual's actions, and further monitored following implementation.	N/A	N/A	N/A

Stage 5: Create an action plan and decide how equality monitoring will take place

Action planning

Summary of actions proposed
<p>Ensure that equality principles and practices are enshrined in our KE&I programmes, from the ideation through to the completion stage.</p> <p>At the start of a large project (not all interactions), and ideally included in the email accompanying general information conveyed at the start of a project, the following statement should be asked to ensure any events or meetings are accessible and flexible:</p> <p>Reasonable adjustments may include:</p> <ul style="list-style-type: none"> • Are there any times that are preferable for meetings? • Are there any software packages you prefer to use? • Do you prefer to meet in-person or online?
<p>Ensure that all documentation in planning and delivery of the work adheres to accessibility standards, including being accessible with assistive technologies such as screen readers.</p>
<p>Offer regular one to one meetings and support sessions to monitor workload for any staff members and researchers impacted.</p>
<p>For staff members away from the University due to pregnancy/maternity, due to celebrating religious events, or caring responsibilities (and others), the project lead will discuss with the member of staff the most suitable time for meetings and ensure flexibility to account for any appointments/ feeding/ sickness / caring responsibilities, ensuring there are no clashes. Projects can also be paused, particularly when deadlines are not a limiting factor.</p>
<p>We will ensure that public engagement events are not prohibitively expensive and are open to everyone regardless of their circumstances. If tickets are on the higher end of this scale, further mitigations can be put in place – for example a certain number of free tickets being offered.</p>

Monitoring

1. Following implementation of this policy, will any equality monitoring be conducted to determine the actual impact of the policy/project on different protected characteristics?

Please type yes or no here: **Yes**

If yes, please give details of which management group or committee will receive the monitoring report: **Open University in Scotland Senior Leadership Team and the Open University Knowledge Exchange Board**

If yes, what is the first date by which equality monitoring will be completed? **31/12/2025**

If yes, what is the frequency of regular monitoring? **Annually, at the end of the calendar year.**



Visit the OU in Scotland website
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Student data in this report relates to our last full academic year 2022-23

Other data sources: OU Employability of Qualifiers Survey 2022 and National Student Survey 2023.

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