

**Imperial College Union
Board of Trustees / 09 December 2020**

Strategic Plan: Draft & Discussion Document

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Purpose: To update Trustees on the current thinking around our new strategy, and to consider some key questions.

1. Context

The Strategic Plan Steering Group has met a number of times over the past month to progress work on our new strategy. We are now at the point where it is important to broaden the conversation with all trustees and consider some major questions before we move on to further consultation with students and staff.

2. Key Questions`

The attached discussion document is structured on the following basis, with a number of key questions highlighted at the end of each section.

Section	Content
Intro	A description of how the plan works and fits into the wider planning cycle for the Union.
One	What is the operating context? Our challenges & opportunities.
Two	Why do we exist? Our mission and operating context.
Three	What impact we will have on students? Our aims.
Four	How will we behave? Our values.
Five	How do we become an effective organisation? Our enablers.
Six	Our key performance measures: a balanced scorecard.

3. Next Steps

As well as further meetings of the Steering Group, once the discussion at Board is complete, the next steps include:

- i. A consultation with all staff on the draft document.
- ii. Values workshops led by the Officer Trustees with pools of senior student volunteers.
- iii. A 'face-to-face' consultation with students on some key questions.
- iv. A consultation with key College staff.
- v. Final approval at either the February or March meeting of Board (depending on the term two operating environment).

GOING BACK TO BASICS: DRAFT STRATEGY 2021-23

HOW DOES THIS STRATEGY WORK?

Great strategy is easy to understand and straightforward to follow. Which is why this plan is structured into six simple sections.

1. We identify and understand the **major contextual challenges and opportunities** that we face.
2. We state what our overall **mission** is and the **theory of change** that underpins all our work.
3. We define what this means for our students as our **aims**.
4. We articulate how we work through our **values**.
5. We identify the **enablers** that will help us to become an effective organisation.
6. We set **key performance indicators** to measure our performance against clear goals.

We also know that a strategic plan is only useful if it is relevant, refreshed and read on a regular basis. The dynamic environment that we operate in requires us to depart from the standard way of approaching strategy – a revolutionary process that sets a new long-term vision every five to ten years. Instead, our intention is to adopt an evolutionary methodology and refine the plan every two years. This will ensure continuity in the areas where we know a longer-term perspective is required, whilst allowing us to adapt the more tangible aspects in light of changing circumstances and organisational development.

It is also important to understand that this strategy does not exist in a silo. It is an essential component and driving force behind the annual planning and objective setting exercise for the Union. It underpins and works in tandem with our democracy to ensure we develop an annual operating plan and associated individual objectives for all those working within the organisation.

	Staff Objectives	Officer Objectives	
	Union Annual Operating Plan [Departmental Plans]		
	Annual Objectives	Officer Manifestos	Other Democratic Mandates
	Strategy		

Questions to Consider

Does this accurately reflect the discussion from the first steering group meeting on the timeframe of the plan?

Does the diagrammatic representation of how the strategy fits with our annual planning round make sense? Are there other factors within this missing?

1. WHAT IS THE OPERATING CONTEXT? OUR CHALLENGES & OPPORTUNITIES

This plan marks the start of a new period for Imperial College Union, as we seek to become a more effective and engaging organisation for our members. To do this effectively it is imperative that we identify and recognize some of our big challenges over the coming years, as well as some of our most exciting opportunities.

We do not exist in a vacuum

We are an essential component of the wider Imperial student experience. With a relaunched College strategy, a professional services transformation project in motion, and a high-profile estates development plan, it is clear that there are major areas where our objectives align closely with the College. There is a real desire across both institutions for our positive transformation, and a real sense of what a successful students' union could look like.

We have exceptional student leadership at all levels

One way of thinking about students' unions is on continuum on the basis of what they *provide directly* for students versus what they *enable and empower students* to provide for themselves. The nature of Imperial College (for example our longer degree programmes) and the mindset of the students enrolled at the institution means as an organisation we sit further towards the latter end of the spectrum than most other unions. We should support, encourage and celebrate this: giving students the opportunity to co create and lead wherever possible.

We have a diverse student population with varying levels of engagement and insight

Imperial is a large, diverse educational community that spans a wide range of distinct student groups. A large portion of what creates a sense of belonging and identity is formed in conjunction with academic study, with departments and faculties creating their own unique cultures. Current engagement levels with the Union vary significantly across these different communities, and we know we must do more to reach out to all students on their terms.

We have a financial model that must become more sustainable

A strong financial position is critical for us to achieve impact for students. The Union's funding model has historically relied too much on volatile income – making our core purpose engagement activities overly reliant on commercial revenue on a day-to-day basis. This has led to both an under investment in the latter area, as well as a lack of continuity, stability and development in the former. After a number of years of significant budget deficits, our free reserves are also significantly depleted, hampering our ability to invest strategically. There is a clear opportunity to address this challenge as we transform.

We must respond to and recover from the COVID-19 pandemic

The COVID-19 pandemic has impacted every area of society, causing us to pause, rethink and deliver our services and activities differently. As we eventually move out of the crisis, we will need to rebuild our operation from first principles, guided by a sense of what we want to become, not what we once were. We must learn the lessons from operating remotely for large portions of time, preserving practices that have proven successful and more effective.

We need to better engage with the wider students' union sector

Imperial is unique. But that that does not mean we should be isolated. We have become too disconnected from other students' unions, missing out on the significant benefits created by a sector that continually shares best practice and works together. We have an exciting opportunity to reengage, firstly within the London higher education community, but then beyond on a national level.

Questions to Consider

Are these the challenges and opportunities we wish to specifically identify? Are there any others we feel are important to include?

2. WHY DO WE EXIST? OUR MISSION

As a membership organisation it is critical that we have a clear, unifying mission statement setting out why the organisation exists. It is our horizon, and ensures we are all heading in the same direction.

Our mission is simple: to make a **positive** impact on the experiences and outcomes of **all** Imperial College students from **all** backgrounds.

Our theory of change sets out clearly the overarching conceptual framework for how this impact will be achieved.

1. Positive impact is delivered by a combination of service provision (doing things for students, or helping them do things for themselves), and advocating for students (representing their interests to others).
2. Providing services for students can be done via direct delivery (doing it ourselves), in partnership with another organisation (most often the College), or via third parties. The appropriate model will differ depending on the nature of the service and where competitive advantage lies.
3. We must be a sustainable, effective and credible organisation in order to provide services and advocate for students' interests successfully. Legitimacy must be earned and will be a key driver for success in both areas of impact.

Questions to Consider

Is this mission statement correct? Could it be more ambitious?

What alternatives do we think we should 'road test' with student leaders?

3. WHAT IMPACT WE WILL HAVE ON STUDENTS? OUR AIMS

The student population at Imperial College is incredibly diverse, with different needs and different expectations of their union. This makes it even more important that we clearly articulate the impact we are seeking to achieve. We've broken it down into seven core themes. Some of these ideas will involve delivering things ourselves or in partnership, whilst some will mean lobbying the College other organisations to do more.

For each of these aims we will set out a broad vision statement for the type of impact we're seeking, and why it is important to our members. We will then set out a number of *big ideas for change* that we'll be working on over the next two years:

1. To improve the **academic** and **educational** experience of students
2. To support and enhance the **wellbeing** of students
3. To strengthen and help create active and inclusive student **communities**
4. To facilitate the **personal** and **professional development** of students
5. To empower students to **change the world** around them
6. To challenge and **reduce inequalities** affecting students
7. To enable students to have **fun**

Questions to Consider

Do these aims represent the full range of impact we seek to have on students at Imperial?

Are there any themes missing from this list?

Are any more or less important, and what order should they be in?

Is the language used appropriate and clear?

4. HOW WILL WE BEHAVE? OUR VALUES

We've said what we're going to do for students, but we also need to state clearly how we'll go about doing it. Our values should permeate everything that we do as an organisation. They should dictate the way we operate, the behaviours we champion, and how the organisation should feel.

1. Value 1
2. Value 2
3. Value 3
4. Value 4
5. Value 5
6. Value 6

Questions to Consider

Tom Newman is leading on a number of values workshops with students, student volunteer leaders and staff. We will be running one of these sessions as part of the Board of Trustees meeting on 9 December 2020.

5. HOW DO WE BECOME AN EFFECTIVE ORGANISATION? OUR ENABLERS

We've outlined what we're going to do and how we're going to do it, but we'll only be able to do this if we're an effective organization now and in the future. This means we'll need:

1. Sustainable resources
2. Great people and culture
3. Strong democracy and professional governance
4. Integrated and innovative technology
5. Effective and engaging communication
6. Comprehensive research, evidence and insight
7. A constructive relationship with the College

Questions to Consider

Do these enablers cover all the key areas of organisational effectiveness?

Are there any that are 'Imperial College specific' that we want to consider?

What are your thoughts regarding our current approach (strengths and weaknesses) in each of these enablers?

6. OUR KEY PERFORMANCE MEASURES: A BALANCED SCORECARD

Mission	A positive impact on the experiences and outcomes of all Imperial College students from all backgrounds.							
Aims								
Values	80% of students associate us with one of our values when asked to describe the organisation in one word 100% of staff can identify and explain at least one value and how it's directly relevant to their role							
Enablers	Sustainable Resources	Reducing our Environmental Impact	Great People & Culture	Good Democracy & Governance	Digital First Ambition	Effective Communication	Comprehensive Insight	Other
			90% of all staff would positively recommend ICU as a place to work					