Imperial College Union
Board of Trustees / 29 Sept 2021

Annual Measuring Round & Baseline Scorecard

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Purpose: To approve the plan for our annual measuring round to track our performance against
               the KPIs agreed in our new strategy.

               To note the 'baseline' data we have for key questions.

1. Context

The Union's new strategic plan includes a balanced scorecard that enables us to measure our overall performance and development, and to track our progress longitudinally. To accompany this, we need an overall policy and plan for how this is done, to ensure consistency year on year.

2. Principles

The following principles underpin our approach to measurement and reporting against our new strategy:

i.   We should use the best evidence available: this means asking direct questions where possible, and prioritising effective data collection and the point where a service or activity is delivered.

ii.   We should look to simplify our data collection: this means being clear about how we are measuring our KPIs and reducing the number of different mechanisms where this is possible.

iii.   We should make reporting automatic where possible and easy where it is not: this means an approach to our systems that does not require specific coding expertise to generate basic management information required a team level.

iv.   We should be clear about when metrics are measured and who is responsible for recording them.

3. Survey Sources

The following data sources have been identified as key for reporting against our balanced scorecard. This includes established data sets produced externally or by the College, as well as a commitment for the Union to undertake a number of surveys ourselves.

It is important to note that these are not the only research or 'listening exercises' envisaged in the new strategy – but will form the 'backbone' of our annual cycle.

		Who	Purpose	Frequency	Reports
National Student Survey	NSS	Final year students	Overall student experience of entire programme of study	Annual	July
Postgraduate Research	PRES	Research students	Overall student experience of entire programme of study	Biennial	Sept

Experience Survey					
Postgraduate Taught Experience Survey	PTES	Postgrad taught students	Overall student experience of entire programme of study	Biennial	Sept
Student Experience Survey	SES	All students	Current holistic student experience of entire programme of study Current holistic experience of the Union	Annual	Feb
Employee Engagement Survey	EES	All staff	Current holistic experience as a staff member in the Union	Annual	Apr
Union Volunteer Survey	UVS	All Union volunteers	Current holistic experience as a volunteer member in the Union	Annual	Apr
CSP Survey	CSPS	All CSP members CSP committees	Current experience of CSP membership Detailed experience as a CSP leader	Annual	May
Stakeholder Satisfaction Snapshot	SSS	Key college staff Other external individuals	Current perception of the Union related to our effectiveness	Annual	Jul
EDI Report	EDIR	SMT	To report on our engagement and participation levels across the Union	Annual	Aug
Line Manager	LM	Line manager	To track performance locally over the course of the year via an in-house mechanism	Annual	Aug

4. 'Underrepresented Students' Questions

Our EDI strategy and action plan (to be approved by the Board in May 2022) will consider the question of which exact metrics we should be interrogating and reporting on. As a starting point, we envisage the following demographic data to be crucial – however, this is subject to change for obvious reasons:

- UG / PG
- Gender
- Faculty
- Fees Status (home / EU / international)

5. Baseline Commentary

The strategy and associated scorecard represents a significant change in directory for the Union, and will therefore require us to implement quite wide-reaching changes to how we collect, manage and use data.

The current baseline data is characterised by the following features:

i.   A significant amount of the data exists, but the workload to retrieve it is substantial – and often requires specific web coding skills. It is not easily accessible at team level, which presents a real challenge.

ii.   There is more useful baseline data within our enablers than within our new aims – which largely reflects some of the challenges we have overcome over the past 18 months.

iii.   There is some imperfect data available for us to use, and this has been noted on the table below to demonstrate where it departs from a new measure.

6. Reporting Format

We have included a full format for the results in a large table below. This is done for completeness and to demonstrate the work required to shift us to an organisation that truly uses data and management information to drive performance.

A simpler and easier to understand format will be developed for future reports and we would welcome Board views on this.

1. Mission KPIs

Question	Data Source	Role Responsible		2019/20	2020/21	Comment
% of students agree we have a positive impact on their life during their time at Imperial College	SES	MD		50.70%	44.50%	
% of students are satisfied with the Union	SES	MD				

2. Aims KPIs

Question	Data Source	Role Responsible		2019/20	2020/21	
To improve the academic and educational experience of students						
% students agree with the statement "the Union has a positive impact on the academic experience of students"	SES	Dir Mem		54.30%	57.70%	Imperfect comparator: NSS Question 26
% of academic reps agree with the statement "the Union supports me effectively in my activities"	UVS	Dir Mem				
% of academic representatives elected and trained	LM	A&R Manager		144	126	
No. of positive changes made by academic representatives	LM	A&R Manager				
No. of academic cases handled by the Advice Centre with a positive outcome	LM	A&R Manager		176	220	No measure of 'positive outcome' has been defined or used
No. of academic related events run by CSPs	LM	SOD Manager				
To support and enhance the wellbeing of students						
% of students agree with the statement "the Union has a positive impact on the wellbeing of students"	SES	Dir Mem		46.80%	46.70%	Imperfect comparator: I feel adequately represented with regards to my wellbeing"
% of wellbeing reps agree with the statement "the Union supports me effectively in my activities"	UVS	Dir Mem				
% of wellbeing representatives elected and trained	LM	A&R Manager		81	74	
No. of positive changes made by wellbeing representatives	LM	A&R Manager				
No. of non-academic cases handled by the Advice Centre with a positive outcome	LM	A&R Manager		219	253	
No. of wellbeing related events run by CSPs	LM	SOD Manager				
To strengthen and help create active and inclusive student communities						
% of students agree with the statement "the Union plays a positive role supporting inclusive student communities"	SES	Dir Mem		47.10%	48.20%	Imperfect comparator: "The Union nurtures a community where students are compassionate, respectful and supportive"
% of CSP leaders agree with the statement "the Union supports me effectively in running our CSP"	UVS	Dir Mem				
% of CSP members agree with the statement "my membership of a CSP has had a positive impact on my life"	CSPS	SOD Manager				
% students a member of at least one departmental and non-departmental CSP	LM	SOD Manager				
% of CSPs returning / continuing from the previous year	LM	SOD Manager				
No. of new CSPs ratified and supported	LM	SOD Manager		14	19	
No. of all events run by CSPs	LM	SOD Manager				
No. of GIAG events and sessions run by CSPs	LM	SOD Manager				
No. of students joining a liberation and community network	LM	A&R Manager		NA	54	
To empower students to change the world around them						
% of students agree with the statement "the Union would support me in making change within the College community and beyond"	SES	Dir Mem		46.5%%	47.80%	Imperfect comparator: "ICU empowers students to have a positive impact on the world around them"
% of student leaders agree with the statement "the Union supports me effectively in making change within the College community and beyond"	UVS	Dir Mem				
No. of positive changes made by OTs within the College	LM	President				

No. of student-led campaigns / ideas for change supported by the Union	LM	A&R Manager				
No. of students standing for election across all our roles	LM	Dir Mem / DRO				
No. of students volunteering in the local community via the Union	UVS	Dir Mem				
To challenge and reduce inequalities affecting students						
% of students agree with the statement "the Union actively works to reduce inequalities on campus that students face"	SES	Dir Mem				
No. of liberation and community activities supported	LM	A&R Manager				
% underrepresented students (to be defined) participating in key Union activities and leadership roles	EDIR	MD				
To enable students to have fun						
% of students agree with the statement "the Union provides services, activities and events that are entertaining and fun"	SES	Dir Mem				
% of students who use our venues agree with the statement "the Union's venues are welcoming and safe"	SES	Dir FR				
% of students agree with the statement "Welcome Week helped me settle into Imperial College and have fun"	SES	Dir Mar		59.00%	34.40%	Imperfect comparator: "ICU improved my experience at the start of term"
No. of Union-run events	LM	Dir FR				
No. of unique students attending Union-run ticketed events	LM	Dir FR				
No. of CSP social events facilitated	LM	SOD Manager				
To facilitate the personal and professional development of students						
% of Union volunteers agree with the statement "volunteering with the Union has supported my personal and professional development"	UVS	Dir Mem				
% of students in at least one volunteer role in the Union	LM	Dir Mem				
% of student leaders attending basic training and induction sessions	LM	Dir Mem				
No. of hours of training offered by the Union across all activities and services	LM	Dir Mem				
No. of types of student staff role in the Union, % of hours worked and money paid	LM	Dir FR				
No. of student nominations for the Student Choice Awards	LM	Dir Mem			209	

3. **Enablers KPIs**

Question	Data Source	Role Responsible		2019/20	2020/21	
Sustainable resources and infrastructure						
Free reserves in line with the policy agreed by trustees	LM	Dir FR		£386,579	£501,955	
No. of changes made within the organisation linked directly to environmental sustainability	LM	Dir FR				
Income (business as usual)	LM	Dir FR		£3,960,820	£3,331,630	
Charitable expenditure (business as usual)	LM	Dir FR		£ 2,865,556	£ 2,118,668	
Enterprise surplus and charitable expenditure (strategic investment)	LM	Dir FR		-£89,140	-£189,182	
% of users agree with the statement "the Union's facilities are high quality and fit for purpose"	SES	Dir Mem		73.70%	71.70%	Imperfect comparator: "I am satisfied with the Union spaces I have used"
Great people and culture						
% of all staff would positively recommend ICU as a place to work (perm)	EES	MD			65%	
% of all staff would positively recommend ICU as a place to work (casual)	EES	MD			36%	
% staff retention rate within the Union	LM	MD				
% of all Union volunteers would describe their overall experience as positive	UVS	Dir Mem				
% overall positive score in the equality, diversity and inclusion theme in the staff engagement survey	EES	MD			52%	

Question	Data Source	Role Responsible		2019/20	2020/21	
Relevant pay gap reporting	LM	Dir FR				
Strong democracy and professional governance						
% of students agree with the statement "I know how to make change in the Union"	SES	Dir Mem				
% of students agree with the statement "the Union is democratic and accountable to the members"	SES	Dir Mem		26.40%	30.70%	Imperfect comparator: "I feel my views are represented at every level within the Union"
% of students agree with the statement "the Union is a well-run organisation"	SES	Dir Mem		42.20%	48.00%	Imperfect comparator: "The Union is a well-run, functional organisation"
% turnout in key Union elections (Officer Trustees)	LM	Dir Mem / DRO		29.57%	31.88%	
Integrated and innovative technology						
% of staff agree our digital systems are effective and support them in their role	EES	MD				
% of Union volunteers agree our digital systems are effective and support them in their role	UVS	Dir Mem				
Effective and engaging communication						
% of students agree with the statement "I'm kept well informed about what the Union is up to"	SES	Dir Mar				
No. of blogs and news stories the Union publishes	LM	Dir Mar			72	
No. of unique web visitors	LM	Dir Mar			294,000	
No. of social media followers (Instagram)	LM	Dir Mar			7,532	
No. of social media followers (Facebook)	LM	Dir Mar			16,216	
No. of social media followers (Twitter)	LM	Dir Mar			9,071	
% read rate of the weekly newsletter	LM	Dir Mar			45%	
Comprehensive research, evidence and insight						
No. of students have participated in at least one survey or 'listening exercise' each year	LM	Dir Mem				
% underrepresented students (to be defined) participating in at least one survey or 'listening exercise' each year	EDIR	MD				
A constructive relationship with the College at all levels						
% of key College stakeholders agree the statement "the Union is well run and effective"	SSS	MD				
A regularly updated Partnership Agreement with the College, alongside a range of operational SLAs.	LM	MD			Yes	
No. of staff nominations for the Student Choice Awards	LM	Dir Mem			302	

4. **Values KPIs**

Question	Data Source	Role Responsible		2019/20	2020/21	
% of students associate us with one of our values when asked to describe the organisation in one word	SES	Dir Mem				
% of staff can identify and explain at least one value and how it's directly relevant to their role	EES	MD				