

**Imperial College Union
Board of Trustees / 30 November 2022**

Annual Balanced Scorecard

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Purpose: To note the update on the approach to measuring organisational performance.

1. Introduction and Context

At the September Board meeting the Annual Measuring Round and Baseline Scorecard was presented to the Board. The approach to measuring and tracking organisational performance was developed as part of the *Back to Basics* strategy development.

Completely changing how we measure organisational performance at this stage in our strategy is not possible, but lessons will be incorporated into the next plan's development. There was consensus from the Board to streamline reporting and ensure reliable data sources were being used in 2022-23. It was agreed that the Managing Director and SMT would undertake the following:

- i. Revise and simplify the 2022-23 approach to measure the performance of the *Back to Basics* Strategy.
- ii. Ensure adequate measures of performance are in place to inform the next strategy which will be picked up in the strategy development work.
- iii. Provide baseline service measurements to ensure the Union monitors services fundamental outputs as business as usual.
- iv. Ensure the next Union strategy has a simplified and unified approach to organisational performance measures.

The paper provides a streamlined reporting format for 2022-23 and an intention to implement service measures when SMT are recruited and in role. Board should provide feedback to the approach for the remainder of the academic year particularly if there are areas Board Members feel are not being adequately measured.

2. Back to Basics Strategy

The Union must measure the performance of its current strategy. The Board should receive a simplified version of the previous reporting format and this is detailed below. All questions are able to be included in the College's Student Experience Survey, which is a well promoted and helpful tool used across College to gain insight into student perceptions of their experiences. All questions below have also been consistently included in the Student Experience Survey or measured consistently for the last two academic years.

2.1 Reporting Format

| Mission KPIs | | |
|---|--|---------------------------|
| To make a positive impact on the experiences and outcomes of all Imperial College students from all backgrounds. | Question | Data Source |
| | % of students agree we have a positive impact on their life during their time at Imperial College | Student Experience Survey |
| | % of students are satisfied with the Union | Student Experience Survey |
| Aims KPIs | | |
| To improve the academic and educational experience of students | % of students agree with the statement “the Union has a positive impact on the academic experience of students” | Student Experience Survey |
| 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” | Student Experience Survey |
| 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” | Student Experience Survey |
| 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” | Student Experience Survey |
| 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” | Student Experience Survey |
| To enable students to have fun | % of students agree with the statement “the Union provides services, activities and events that are entertaining and fun” | Student Experience Survey |

| | | |
|--|---|--|
| 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” | Student Experience Survey |
| Enablers KPIs | | |
| Sustainable resources and infrastructure | Free reserves in line with the policy agreed by trustees Enterprise surplus and charitable expenditure (strategic investment) % of users agree with the statement “the Union’s facilities are high quality and fit for purpose” | Audit Student Experience Survey |
| Great people and culture | % of all staff would positively recommend ICU as a place to work | Staff Engagement Survey |
| Strong democracy and professional governance | % of students agree with the statement “the Union is a well-run organisation” % turnout in key Union elections (Officer Trustees) | Student Experience Survey |
| Integrated and innovative technology | % of staff agree our digital systems are effective and support them in their role % of Union volunteers agree our digital systems are effective and support them in their role | Staff engagement Survey Student Experience Survey |
| Effective and engaging communication | % of students agree with the statement “I’m kept well informed about what the Union is up to” | Student Experience Survey |
| Comprehensive research, evidence and insight | Number of changes achieved based on Union research and insight | |
| Values KPIs | | |
| | % of students associate us with one of our values when asked to describe the organisation in one word % of staff can identify and explain at least one value and how it’s directly relevant to their role | Staff Engagement Survey Student Experience Survey |

3. Service Measures

As part of consolidating the *Back to Basics* strategy outputs, the Union needs to undertake a team-by-team approach to understand the fundamental service levels each team should be delivering to their service users. Each service level should have a key performance indicator that Operational and Senior Managers can monitor performance against. This should be established in a collaborative manner with the Operational Management Group once the Senior Management Team is in place. These service measures will be incorporated in business as usual reporting and the next strategy’s

balanced scorecard. Each Senior Manager will be tasked with developing the relevant service measures in time for the May 2023 Board meeting.