

**Imperial College Union  
Board of Trustees / September 2024**

**Operating Plans (OPs) Summary**

- Author(s): Tom Newman (Managing Director)  
 Ashley Cory (Interim Director of Support Services)  
 Cat Turhan (Director of Membership Services)  
 Robert Pegg (Director of Commercial Services)
- Purpose: To update Board on the Union's annual planning round and provide a high-level summary of some key developmental projects planned for the 2024/25 academic year.
- Decision(s): Board is invited to **note** the OPs summary alongside the balanced scorecard.

**1. Context**

In July 2023 the Board approved the Union's new Strategic Plan and direction. Team level and SMT objectives have been developed to help achieve the strategy,

As per the terms of reference approved by the corporate governance review in 2021, the Union's Management Committee has the delegated authority on behalf of Board to:

- *Lead on the development and delivery of the annual planning, budgeting and monitoring rounds.*
- *Approve operational policies and procedures related to the services and activities of the Union.*

A high-level summary of the objectives for the organisation in 2024/25 has been produced to assure Board and provide oversight of the planned work this year.

**2. Structure & Process**

Operating Plans (OPs) have been produced at the *team* level. Each plan is owned and has been developed by the relevant line manager, with oversight and direction provided by the relevant senior manager. These objectives have been developed via workshops at the team level and at an all staff away day in August 2024.

<b>Area</b>	<b>Staff Lead</b>	<b>Senior Manager</b>
Governance	Clem Jones	Ashley Cory
Representation	Helena Schofield	Cat Turhan
Advice	Henry Setter	Cat Turhan
Student Activities	Rob Fenner & Lucy Brown	Cat Turhan
Facilities, Health & Safety	Sital Gandesha	Ashley Cory
Digital & Marketing	Ailis Fahim	Ashley Cory
People	Anastasia Terzoglou	Ashley Cory
Retail	Chris Francombe	Rob Pegg
Venues	Kat Iliopoulou	Rob Pegg
Events & Partnership	Roberto Sorrentino	Rob Pegg
Finance	David Ashton	Ashley Cory/Peter Greaney

Team Objectives were considered by the Union's Management Committee on 15 August. This meeting also included an overview presentation of Officer Trustee objectives. Further termly reviews are scheduled for the following meetings:

- i. November 2024
- ii. March 2025
- iii. June 2025

### 3. Objectives Summary

Area	Objectives
Governance	<ul style="list-style-type: none"> <li>Improve the complaints and disciplinary process</li> <li>Complete outstanding effectiveness reviews – Governance Committee and Board of Trustees</li> <li>Develop a trustee experience package to help induct new/continuing trustees</li> <li>Support the Democracy &amp; Corporate Structure Review</li> </ul>
Representation	<ul style="list-style-type: none"> <li>Create an Advocacy &amp; Influencing plan</li> <li>Support the Democracy &amp; Corporate Structure Review</li> <li>Formalise a positive volunteer experience</li> <li>Develop a high impact approach to policy &amp; research</li> </ul>
Advice	<ul style="list-style-type: none"> <li>Develop a proactive support offer that incorporates Advice, Health and Wellbeing</li> <li>Embed new applicable data systems to monitor the service and its new systems</li> <li>Broaden the reach of the SU Advice Service</li> </ul>
Student Activities	<ul style="list-style-type: none"> <li>Conduct a Process Review &amp; Implementation</li> <li>Improve CSP Inventory &amp; Storage</li> <li>Define and deliver excellent customer service</li> <li>Deliver an excellent volunteer/part-time staff experience</li> </ul>
Facilities, Health & Safety	<ul style="list-style-type: none"> <li>Building Management Plan implementation</li> <li>Complete a Estates Service Level Agreement</li> <li>Implement Green Impact Sustainability Framework</li> </ul>
Digital & Marketing	<ul style="list-style-type: none"> <li>Develop a social media policy and strategy</li> <li>Roll out the brand refresh</li> <li>Communicate impact to provide an understanding of the Union</li> <li>Enhance use of data and insight</li> <li>Modernise server infrastructure</li> <li>Develop excellent digital presence and identity</li> <li>Determine future of digital systems</li> </ul>
People	<ul style="list-style-type: none"> <li>Deliver streamlined multi-channel communication that informs and engages all staff</li> <li>Organise ongoing training and development to empower staff to excel in their roles</li> <li>Deliver a consistent and welcoming induction experience for all staff</li> <li>Deliver effective and inclusive recruitment experience</li> </ul>

Retail	Strengthen internal capabilities and satisfaction Enhance customer experience and loyalty
Venues	Review H&S, licensing and sustainability Full outlet and service review Grow venue revenues
Events & Partnerships	Diversify event offerings Enhance revenue driving events Expand commercial partnerships
Finance	Develop and support the operation of FAR Prepare for changes arising from corporate structure review and commercial plan Remain agile to strategic investment requirements Implement the year end and budgeting cycle Implement remaining VAT review changes

*Board is invited to **note** the Operating Plans summary.*