Invitation to tender
KCLSU strategic review planning.
Abstract
The King’s College London Students’ Union is looking to appoint an external research partner to help us conduct our strategic review research, help formulate a six-year strategic plan that will help us develop and shape our priorities for the period of 2019 and beyond.

This Document provides an overview of the work that KCLSU would like an external research partner to consider and base their tender submissions on.

The deadline for the tender submission is 5pm 6th August 2018.
1. Executive Summary

The King’s College London Students’ Union (KCLSU) is a registered charity and a member led organization. It is the associated Students’ Union for King’s College London and with it’s 145 year history it is the oldest Students’ Union in the UK. One of our early Presidents Ivison Macadam, went on to become the founding president of the National Union of Students in 1922 and more recent presidents have overseen an increase in student participation across many of its offerings. The Students Union has a presence in three campuses and has recently been granted funding to develop further our presence at the fourth King’s campus in Denmark Hill.

KCLSU is currently going into its final year of its strategic plan known as the Big Plan which was devised in 2014 and created using the theory of change methodology. The Union’s Trustee Board has decided that it is time to create a new strategic plan that would be long lasting but yet retain the ability to deal with the external challenges that are due to change rapidly. Therefore, the Board members have decided that a six year strategy should be created that would be deemed as a 1, 3, 6 strategy, which is a six year strategy that has a key deliverables created for year 1 as well a review period for year 3. The board have also decided to appoint an external partner to conduct research with stakeholders and deliver the research to create the strategic document. The union has ensured that our students are provided with sector leading services and development opportunities to help them get the most out of their time in London, shape the world around them and help them remove barriers they may face; however, it considers that it has not yet identified a pathway through which it will represent the needs of its students.

Ultimately, everything we do is led by students. We have a team of six sabbatical officers who are elected each year to lead the union and ensure we remain true to our values of student leadership and empowerment. They are the public face of the organization and act as our chief advocates to decision makers over student life.

Currently, KCLSU has a 33% annual staff turnover rate and low staff engagement. A new CEO was recruited commenced work in May 2018 who has been delegated the task of leading on the strategic plan. The previous strategic plan was developed in 2014 and was scheduled to expire in July 2019. It was the first time the organization developed a long term strategy which was underpinned by stakeholder research and engagement. For our next plan, the quality of the research and the level of stakeholder engagement needs to be high across the spectrum of stakeholders. We want our plan to be an authentic embodiment of our member’s needs; therefore, it is imperative we are able to take a critical look at our operating environment.

This brief outlines the objectives and desired outcomes of that review, the purpose of which is to shape the strategic direction and priorities for the King’s College London Students’ Union over the next six years, with the ability to respond to changes effectively, keep staff motivation high as well as enable engagement from our broad membership.

An essential element of this review process is to provide the Union with more intelligence and a richer understanding of our stakeholders, both as members of the Union, students at the King’s College London, global citizens and consumers of products, services and information providers.
Alongside the development of the strategy, the Union is keen to undertake an organizational review
to ascertain if the internal resources are sufficient enough for the Union to meet it the key strategic
aims identified. We are also acutely aware that our students are early adopters of technology and
comfortable operating in a digital environment, and historically as an organization we have lagged
behind their expectations.

Whilst our use of digital channels is growing as part of our digital transformation, we have no real
deep understanding of our members’ digital lives and how they would like services to be delivered
in the future. This research will partly help us fulfil our desire to become the experts on the students
of the King’s College London.

2. Purpose/Objectives

The purpose of this review is to shape the strategic direction and priorities for The King’s College
London Students’ Union over the next six years starting from 1st August 2019, but with the ability
to create key targets for year one as well as review the progress and make accommodations for
changes in year three.

The fundamental requirements of the chosen supplier are to
- Complete a comprehensive review of our current Big Plan and learn appropriate lessons;
- Involve the full range of stakeholders (listed in section 4) in the development of the Strategic
  Plan 2019 and beyond;
- Devise the Strategic Plan to ensure we are a dynamic, modern organisation fit for all
  students.

Objectives
1. Help us reflect upon the impact KCLSU has had thus far and provide a desktop analysis of
   the impacts that KCLSU stakeholders would like KCLSU to make in the next strategic plan.
2. Help us develop and refine our mission, vision and values to ensure it reflects member
   needs and ensure that it is impact driven and based on the principles of Change Theory
3. Identify the biggest issues facing our members and identify ways in which our members
   could be supported and empowered to overcome these issues.
4. Gain a greater understanding of who our members are and their behaviors, habits,
   lifestyles, demographics, concerns and motivations.
5. Provide an insight into our members’ digital use, behaviors and preferences
6. Understand their cultural and educational needs in more detail
7. Identify any gaps in our current service mix which could present us with opportunities in the
   future.
8. Help facilitate the creation of a strategic plan with
   a. clear impacts that are developed through participate research
   b. which can be measured by consistent range of Measures of Successes (MoS)
   c. as well as annual plans that help facilitate progress on the strategic plan.

Relate these findings back to The Union and what they mean for us.
3. Background

The current strategic plan can be found here. The plan was formed via consultation with the NUS. Further information in relation to how we are performing, including access to a range of data and research results will be made available to the appointed partner.

The strategic review will be overseen by a project board that will consist of the CEO, the President, one of our lay trustees and the Senior Leadership Team.

4. Target Audience

To ensure that the findings and subsequent recommendations are robust, we would like the researchers to suggest the highest possible percentage that they could obtain for us. We expect the research to be triangulated.

The pool must be appropriately representative of our student body and needs to include our under-represented students e.g. BAME, international students, postgraduate students etc.

Currently we do not understand our audience in enough detail. Whilst many students’ unions have developed sophisticated mechanisms to measure student satisfaction and attitudes, we have slipped behind this trend. We want to become a data-driven & evidence based but our insight can be fairly basic although we have access to a lot of data on our audiences, and market research has been conducted on a project basis. In addition, we don’t have any great insight into what makes them tick as individual members of society outside their membership of the union and how that impacts on our service development. This is a fundamental gap in our knowledge that this research will need to address.

Too often we broadcast our information to all students but want to have more targeted communications and conversation with them using demographic profiles. Examples of this include age, mode of study, nationality, accommodation type and level (undergraduate or post-graduate). There has been some interesting data analysis conducted by our internal team looking at ways in which students interact with the Union. We have also completed a research project in conjunction with NUS on how students engage with our democratic and governance systems.

We would like this research to break down the barriers and assumptions associated with segmenting purely based on demographic profile and provide an alternative model.

Alongside the running of this member research, we will be keen for the tender agencies to conduct some further research with other audience groups, including: Union staff and University partners. We would like the appointed partner to engage with these stakeholders with the intention of ensuring we tie in themes and methods into everything we do. We would however like our chosen partner to engage and interview a number of community stakeholders. We will launch the plan in readiness for the start of the 2019 academic year.
# Table 1: Stakeholders needed to be consulted

<table>
<thead>
<tr>
<th>Relationship with which stakeholder</th>
<th>Description of relationship and why it is important</th>
<th>Minimum % needed to be consulted or members needed to be consulted</th>
<th>Importance of the relationship to this project High/Medium/Low</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Students – the broad Membership</strong></td>
<td>They are our Members, our customer base and our organisational purpose is to provide for and to represent them.</td>
<td>% To be defined by the research company. Has to demonstrate how they will provide feedback from a cross section of our demographic.</td>
<td>HIGH</td>
</tr>
<tr>
<td><strong>Students – ‘involved’ students (e.g. volunteers and elected officers)</strong></td>
<td>They are our current ‘service users’ and are our ambassadors and our future leaders.</td>
<td>% to be defined by the research company.</td>
<td>HIGH</td>
</tr>
<tr>
<td><strong>Sabbatical Officers</strong> (Note: the new team for 2018/19 will begin with us on 1st August)</td>
<td>These are our student leaders elected from our membership who are also part of trustee board. They provide board oversight and strategic management of the Students’ Union</td>
<td>100%</td>
<td>HIGH</td>
</tr>
<tr>
<td><strong>Lay and Student Trustees</strong></td>
<td>Board Oversight and Strategic management of the Students’ Union.</td>
<td>100%</td>
<td>HIGH</td>
</tr>
<tr>
<td><strong>Senior Leadership Team (SLT)</strong></td>
<td>These are the directors at KCLSU and integral to delivery of our Plan and for the overall strategic ownership</td>
<td>100%</td>
<td>HIGH</td>
</tr>
<tr>
<td><strong>Departmental Leadership Team (DLT)</strong></td>
<td>These are heads of teams at KCLSU &amp; will need to have buy-in to operationalise the plan.</td>
<td>100%</td>
<td>HIGH</td>
</tr>
<tr>
<td><strong>Non Student Staff &amp; Managers</strong></td>
<td>Colleagues that would help deliver the plan</td>
<td>Aim for 100%</td>
<td>HIGH</td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td>Stakeholders and Areas of Focus</td>
<td>Level</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
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<tr>
<td><strong>Student Staff</strong></td>
<td>Students that work in our front line service and who will help pass on the mission, vision and values of the plan</td>
<td>Aim for 100%</td>
<td>HIGH</td>
</tr>
<tr>
<td><strong>The University</strong></td>
<td>Our main partner and funder</td>
<td>All of the University’s Senior Management Team as well as a cross section of the University academic and non-academic staff.</td>
<td>HIGH</td>
</tr>
<tr>
<td><strong>The local community and local government</strong></td>
<td>Increasingly important stakeholders.</td>
<td>Westminster, Lambeth and Southwark</td>
<td>LOW</td>
</tr>
<tr>
<td></td>
<td></td>
<td>London Mayor’s Office</td>
<td></td>
</tr>
<tr>
<td><strong>King’s Alumni</strong></td>
<td>Ex-members of KCLSU with helpful insights.</td>
<td>A small cross selection.</td>
<td>MEDIUM</td>
</tr>
<tr>
<td><strong>London Peers</strong></td>
<td>Students’ Union Across London who are our peers</td>
<td>UCLA, Imperial SU, Queen Mary SU, LSE SU</td>
<td>LOW</td>
</tr>
<tr>
<td><strong>External</strong></td>
<td>Other stakeholders with insights</td>
<td>A small selection.</td>
<td>LOW</td>
</tr>
</tbody>
</table>

### 5. Methodology

After reading and understanding the brief, purpose and objectives of this review process, potential partners are invited to make their own recommendations on the research methodologies that could be used to achieve the desired outcomes within timescales and budget. We would be particularly excited to hear about new and experimental methods which might go beyond traditional research methods.
6. Outcomes

The chosen partner will be required to deliver these nine key elements of the review:

1. A detailed timeline indicating how the project will be conducted whilst ensuring that it will be ready for approval by the Board of Trustee.
2. Stakeholder engagement sessions
3. Market research plan & implementation which will deliver against objectives
4. Interim research report outlining key findings
5. Market research report containing all findings and strategic recommendations
6. Presentation of findings and recommendations to key stakeholders, including the Board of Trustees, Union Senior Leadership team and the University.
7. Second presentation to all Union staff, elected officers of the Union and University partners
8. Review and confirm the strategic document is in line with the research findings
9. Strategic Document created in line with stakeholder consultation

There may be post consultation work to support the development and delivery of the final strategy. This would be briefed and budgeted separately.

7. Budget and Timescales

The total maximum budget for this project is £15,000 (including VAT). This budget must cover all of the outlined outcomes and associated costs for achieving them. If further costs are associated, the Union would be keen for the providers to indicate those costs.

<table>
<thead>
<tr>
<th>Action</th>
<th>Deadline/Timescale</th>
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</thead>
<tbody>
<tr>
<td>Invitations to tender</td>
<td>23rd July 2018</td>
</tr>
<tr>
<td>Deadline for tender submissions</td>
<td>6th August 2018</td>
</tr>
<tr>
<td>Review &amp; Shortlist</td>
<td>6th August 2018</td>
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<tr>
<td>Invite agencies to present</td>
<td>10th August 2018</td>
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<tr>
<td>Review and decision making</td>
<td>10th August 2018</td>
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<tr>
<td>Appoint successful partner</td>
<td>10th August 2018</td>
</tr>
<tr>
<td>Successful Partner to present to Project Delivery Board</td>
<td>13th August 2018</td>
</tr>
<tr>
<td>Review of previous plan with internal stakeholders</td>
<td>To be identified by external partner</td>
</tr>
<tr>
<td>Research and consultation with membership and stakeholders</td>
<td>To be identified by external partner</td>
</tr>
<tr>
<td>Presentation of key findings and discussion with stakeholders about the possible strategic themes</td>
<td>To be identified by external partner</td>
</tr>
<tr>
<td>First Iteration of a strategic plan</td>
<td>To be identified by external partner</td>
</tr>
<tr>
<td>Discussion with wider stakeholders regarding first draft</td>
<td>To be identified by external partner</td>
</tr>
<tr>
<td>Finalisation of strategic plan and submission to the Board of Trustees.</td>
<td>June 2019 Board meeting</td>
</tr>
<tr>
<td>Final document created and ready for implementation.</td>
<td>1st August 2019.</td>
</tr>
</tbody>
</table>

**8. Responding to the tender**

The tender process will take the form of a written response to the below briefs. Your response be reviewed prior to inviting you to present to the Union team. Please take into account the weightings of the each of the questions below. These have been formed based on our interest and imperatives as part of the project.

Please respond to this brief by outlining:

8.1) Your understanding of the brief and objectives. **Scoring weighting: 10%**
8.2) Your suggested methodologies for conducting research and engaging with stakeholders **Scoring weighting: 15%**
8.3) Your recommendations for delivering each of the additional outcomes to a high standard **Scoring weighting 60%**
8.4) Your total charges for this project, how you will allocate the budget and demonstrate value for money for the Union. **Scoring weighting: 5%**
8.5) Your relevant experience of delivering similar projects to that outlined within this brief, including case studies. **Scoring weighting: 10%**

You will present this information to a panel in KCLSU at a [pitch meeting on 10th August](#). We will have powerpoint facilities available but you can present in a format that you feel comfortable with and that you feel will demonstrate your work most effectively.

We would appreciate up to 3 references from work completed for other clients.

The deadline for submitting this information is 5pm 6th of August 2018

All questions and answers in relation to this tender will be made accessible to all bidders via our online question and answer log, which can be viewed by clicking here.

**9. Contact details**

Please direct any questions relating to this brief or the tender process to:
Denis Shukur (Chief Executive)
Email: denis.shukur@kclsu.org
Mobile: 07942 907 050
10. Confidentiality statement and disclaimer

The information contained in this ITT and all other information made available at any time to the candidates by and on behalf of KCLSU is supplied on the basis that the candidates will keep such information confidential at all times and that such information will be used only for the purposes of participating in the bidding process. No information contained in this ITT or any other written, oral or other information made available to the candidate shall form the basis of any warranty, representation or term of any contract by KCLSU with any third party.

KCLSU does not accept any responsibility or liability for the accuracy or completeness of the ITT or any other oral or written information provided by KCLSU to any candidate. KCLSU reserves the right not to follow this ITT in any way and/or to withdraw from or amend the procurement process.

KCLSU rights to change or cancel

KCLSU reserves the right, without prior notice and in its absolute discretion, to change or terminate the tendering procedure for the project, including requesting additional information, at any time before signing the contract with the successful candidate.

Any access to KCLSU data will only be provided on signing of a data processor agreement with KCLSU.