



MANAGEMENT GROUP GUIDE

KEY INFORMATION FOR MANAGEMENT GROUP
OFFICERS 2024/25

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ABOUT THIS GUIDE

This guide is primarily targeted at management group officers, who's job it is to represent a group of societies, their committees, and their members.

This guide acts as a starting point for your role and will be supplemented by training provided by the Student Activities Team and the DPCS.

TEAM EMAILS

These are the emails that you should advise students to contact in most situations. These group emails allow students to contact staff within various groups easily, whilst avoiding emailing staff members directly.



STUDENT ACTIVITIES TEAM

ACTIVITIES@IMPERIAL.AC.UK

All student activity enquiries, from room bookings and equipment to events and risk assessments. This email is monitored by the entire activities team and allows the team to respond most efficiently, instead of emailing individual team members.



REP TEAM

ICU.REPRESENTATION@IMPERIAL.AC.UK

The representation team oversees all democratic processes including leadership elections (CSP elections inquiries should go to the activities team), academic & wellbeing reps, and LCOs.



ADVICE TEAM

ADVICE@IMPERIAL.AC.UK

Free, confidential advice for all students including, but not limited to, academic issues, halls of residence, complaints, signposting.



ICU FINANCE

ICU.FINANCE@IMPERIAL.AC.UK

General finance queries and amending already approved financial documents. Not for expediting payments/approvals.



UNION HELPDESK

UNION@IMPERIAL.AC.UK

For all queries directed towards the Union. Useful when the specific team/staff member can't be identified.

OFFICER TRUSTEES

The Officer Trustees are the elected full-time representatives for students at ICU. The main officers you will work with as MG representatives are the Deputy President (Clubs & Societies), aka 'DPCS', and the Deputy President (Finance & Services), aka 'DPFS'.



UNION PRESIDENT

CAMILLE
BOUTROLLE

UNION.PRESIDENT@IMPERIAL.AC.UK

The President is responsible for the overall vision and strategic direction of the Union, representing the Union to the University and the wider community.



DPCS

CHRISTIAN
COOPER

DPCS@IMPERIAL.AC.UK

The DPCS is responsible for the development and representation of the 350+ clubs and societies in the Union, representing their views and ensuring they have access to the support and resources they require. **The DPCS will be your main point of contact as an MG Officer.**



DPFS

STEPHANIE
YEUNG

DPFS@IMPERIAL.AC.UK

The DPFS is responsible for overseeing society finance, including annual budgeting, as well as the Union's commercial services, such as the bars and retail. The role has recently also taken the lead on Union sustainability and development.



DPE

EMINA
HOGAS

DPEDUCATION@IMPERIAL.AC.UK

The DPE represents the academic interests of all students at Imperial College, working with academic reps from a year to faculty level.



DPW

NICO
HENRY

DPWELFARE@IMPERIAL.AC.UK

The DPW represents the wellbeing and community interests of all students at Imperial College, working with wellbeing reps from a year to faculty level, and the liberation and community officers.

MANAGEMENT GROUP STRUCTURE

WHAT IS A MANAGEMENT GROUP?

Management groups (MGs) represent and assist CSPs which share a common theme. Management groups are either standalone or are part of a Constituent Union.

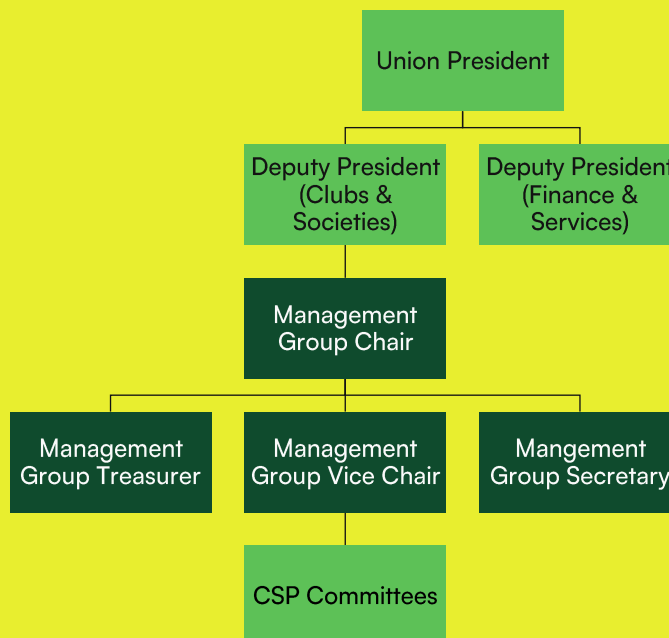
STANDALONE

MANAGEMENT GROUPS

In a standard Management Group, i.e. one elected for the sole purpose of being a management group, all elected officers are part of the MG.

This applies to:

- Recreation Sector
- Arts & Entertainments Sector
- Sports Sector
- Culture Sector
- Knowledge Sector
- Community Sector



CONSTITUENT UNION

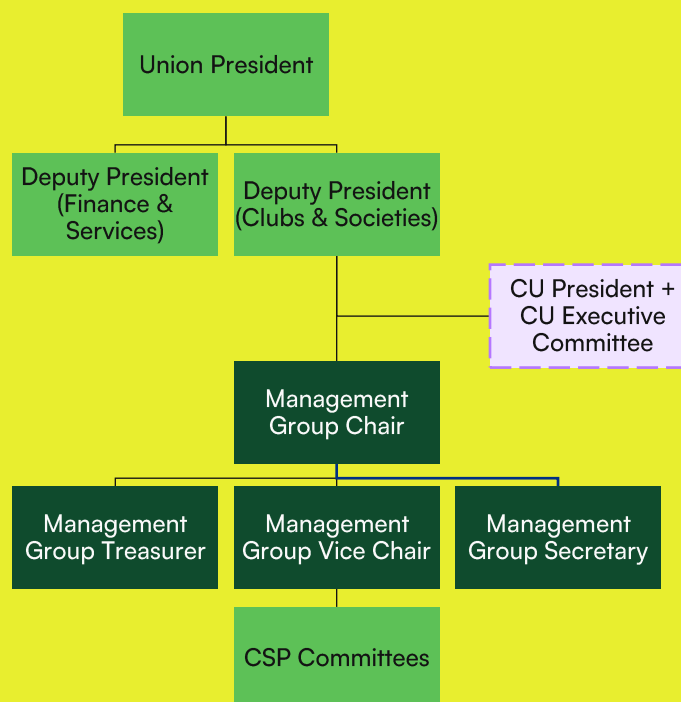
MANAGEMENT GROUPS

Where a Constituent Union (CU) acts as a Management Group, a sub-section of the CU fulfils the MG responsibilities.

The MG is the section of the CU responsible for representing and administering CSPs.

For most CUs, the MG Chair will be the elected Clubs & Societies Chair or Vice President (Clubs & Societies) for the CU.

The day-to-day running of the MG should be carried out by these people, not the CU President, whose job it is to run the CU. The CU President, however, should still maintain communication with, and oversight of, the MG.



ROLES & RESPONSIBILITIES

Management groups exist as a bridge between Imperial College Union and CSP committees/members. As a management group officer you are often the first port of call for CSP committees for advice and support. In general, it is a management groups responsibility to:

- Oversee & approve the finances of CSPs.
- Oversee and facilitate the development and delivery of CSP activities.
- Communicate with CSPs regularly.
- Represent CSPs to the Union through the relevant boards and meetings.
- Help CSPs with issues and queries and offer support where necessary and possible.

It is not your responsibility to run each CSP within your management group. That is the job of each CSPs committee.

MANAGEMENT GROUP CHAIR

- Represent the Management Group and its CSPs to the Union through the relevant boards and meetings.
- Chair Management Group meetings.
- Be responsible to the Union President, through the Deputy President (Clubs & Societies), for the finances, health & safety, adherence to policy and activities of the Management Group and its CSPs.
- Be responsible for the efficient organisation and administration of the Management Group and its promotion/advertising within Imperial College Union.
- Oversee the development and delivery of CSPs within the Management Group.

As an MG Chair, you should maintain oversight of your MG executive committee and assist where necessary. You shouldn't need to micro-manage!

MANAGEMENT GROUP VICE CHAIR

- Have the same responsibilities as the Chair, but in respect to their relevant sub-groups.

MANAGEMENT GROUP TREASURER

- Deputise the Chair in their absence.
- Be responsible for administering the finances of the Management Group and its CSPs.
- Assist and oversee CSPs during the budgeting period.
- Assist CSPs in preparing funding applications.

MANAGEMENT GROUP SECRETARY

- Be responsible for the efficient administration of the Management Group.
- Be responsible for communication between the Management Group and its CSPs.
- Record and prepare meeting minutes.

These job outlines only detail the core responsibilities of each role. You will find that each MG role has additional responsibilities outlined by its standing orders/constitution. It is important to ensure that when handing over the position, the additional responsibilities of each role are communicated.

UNION BOARDS, FORUMS & MEETINGS

One of the main ways in which you represent your CSPs is through Union Boards and Forums. The following are the most relevant boards for MG reps. You may find that you are invited to additional Union or College boards/forums where appropriate.

Board/Meeting	Description	Attendance	Chair	Frequency
CLUBS, SOCIETIES & PROJECTS BOARD	Clubs, Societies & Projects Board meets monthly and oversees the provision and development of all CSPs at ICU. It is the place where you can affect the most change within CSPs and it is important that each MG has representation here.	All MG reps, where possible, but at least 2 reps from each MG.	DPCS	Monthly
NEW ACTIVITIES COMMITTEE	The sub-committee of CSPB responsible for approving the creation or closure of new CSPs. Membership is drawn from volunteers from CSPB.	Voluntary. Nominations taken at the first CSPB meeting,	DPCS	Termly
ACTIVITIES DEVELOPMENT FUND COMMITTEE	The sub-committee of CSPB responsible for approving ADF funding for CSPs. Membership is drawn from volunteers from CSPB.	Voluntary. Nominations taken at the first CSPB meeting,	DPCS	Twice-Termly
TRIPS FUND COMMITTEE	The sub-committee of CSPB responsible for approving trips funding. Membership is drawn from volunteers from CSPB.	Voluntary. Nominations taken at the first CSPB meeting,	DPCS	Twice-Termly
UNION COUNCIL	Union Council is the most senior decision-making and policy-making student board at ICU.	Each standalone MG chair, and CU presidents, academic, and welfare officers.	Union Council Chair	Monthly

CLUBS, SOCIETIES & PROJECTS BOARD (CSPB)

All MG reps should attend CSPB when possible. CSPB meets monthly to discuss all matters relating to student activities and provides the chance for you to raise issues and concerns to the Union as well as have your say on policy, procedure and projects. Agendas are circulated before every meeting and deadlines are set for submission of agenda items. All CSPB members can, and are encouraged to, submit agenda items for discussion.

MG UPDATES

MGs are required to provide updates to CSPB at each meeting. These updates do not need to be highly detailed or long (unlike Union Council, for CUs), but a brief verbal summary should be given at each meeting (no longer than 3 minutes).

The aim of the updates is to make sure that MGs are on top of their responsibilities and for union staff to assist where necessary. Think of it as a chance to show off what great things you've been up to!

CSPB DATES

CSPB dates for the 2024/25 academic year can be found in your role account calendar!

FUNDING

CSPs are funded through a variety of sources, from their own income to Union grant and external funding sources.

FUNDING SOURCES

Depending on the source of funds, they will be placed into different funding codes. Some funding sources have restrictions on their usage which you need to be aware of.

Funding (code)	Source	Usage/Restrictions
Grant (0)	Annual Budgeting	Only for core activities it was allocated for.
	ADF Funding	Only for core activities it was allocated for.
SGI (1)	Membership Income	All core CSP activity.
	Shop Income	Any CSP activity (as advertised on the product sold).
	Sponsorship	Dependant on contract.
	Donations	Dependant on donation letter.
Harlington (2)	Harlington Trust	Only for activities it was allocated for.
ICTrust (3)	IC Trust	Only for trips it was allocated for.
College (4)	Move Club	May be subject to any conditions imposed by Move Imperial.
	Development Fund	
	Departmental/Faculty	May be subject to any conditions imposed by the Department/Faculty.
	Donations	

FUNDING OPPORTUNITIES

The funding opportunities below are the ones managed by the Union, in addition to annual grant and external sources such as sponsorship.

Activities Development Fund

The activities development fund (ADF) is a pot of money set aside by ICU for developing new activities or supporting clubs with unbudgeted success. Applications are reviewed by the ADF committee, a sub-committee of CSPB.

Trips Fund

Applications are reviewed by the trips committee, a sub-committee of CSPB. Trip applications must be submitted alongside a funding application. Trips funding is governed by the **trips funding policy**.

Harlington Fund

The Harlington fund is for facility development, equipment refurbishment, capital expenditure and specialist training. The fund is administered by the College. Applications are made via a form on the ICU website, then reviewed by the activities team and DPCS before being collated into an application passed on.

FINANCE

WHAT'S YOUR JOB?

Your job is to support CSPs with making good financial decisions and assisting them with eActivities. As such, it is important that you understand all types of transactions and processes on eActivities even if you won't be using them often yourself.

A large part of your job on eActivities will be to review and approve CSP expenditure. You should be thorough and consistent, ensuring that you don't miss anything that could negatively impact a CSP or ICU. It is best to be overly cautious than to let things slip through. Your finance training on eActivities will detail exactly what is required for each type of transaction. The below sections provide an overview of the biggest issues and things to watch out for. **PLEASE MAKE SURE YOU COMPLETE THE eActivities TRAINING TOO!**

EXPENDITURE

<https://eactivities.union.ic.ac.uk/training/collections/99>

The following is a summary of some important info and tips regarding expenditure.
Please read the training above in full first.

Above all else, it is imperative that you check a CSP has enough money to make a purchase before you approve it.

PURCHASE ORDERS

Purchase orders (POs) are the most preferred type of expenditure for CSPs, as they are the simplest to fulfil and involve low financial risk.

An authorised purchase order is a legally binding document stating that you will pay for specified goods or services. A supplier will receive a PO and either invoice you immediately or invoice you once the goods have been delivered. If they require payment before they produce the final invoice or deliver the goods you should tick the box for "pro-forma". A pro-forma invoice is an estimate of the final costs.

Once the invoice is uploaded to eActivities, payment will be made. Payments take the form of a BACS transfer from ICU to the supplier. As ICU is paying the supplier, there is no financial risk for students.

Top Tips:

- If you're approving grant expenditure, make sure the CSP has enough grant within the specific account (e.g., Instructors).
- A PO might temporarily take a CSPs SGI negative — this is only allowed if the club has an approved event/trip budget for the expenditure. Grant must never go negative.
- Don't approve any non-core expenditure over £500 without an event budget.

CLAIMS

Claims are useful for small payments that a student has made on behalf of a club. For example, paying a referee, or getting snacks for a meeting.

Claims have strict requirements regarding evidence. Evidence must include proof of purchase (e.g., a receipt) and proof of payment (e.g., a bank statement).

Receipts	For payments of less than £250, till receipts are usually sufficient evidence - full details of the requirements for different types of receipts are given on the Suitable VAT evidence page - for purchases of £250 or over, you should try and get a VAT invoice. Please ensure that the receipts you provide are printed and not handwritten, the Union will only accept handwritten receipts in exceptional circumstances.
Other purchase documentation	Other documents which describe the expenditure clearly. If these documents do not meet the requirements for VAT then VAT cannot be reclaimed. Examples could be purchase confirmation emails.
Bank or credit card statements	These can be used as proof of payment. It will support other forms of evidence where it is not clear from those documents who made the purchase or that the payment has been made.
Receipts not in GBP (£)	Evidence for expenditure not made in sterling should be accompanied with a copy of the bank statement entry showing the exchange rate. If this is not available, the exchange rate on the date of purchase should be included in the notes.
No documents	In rare circumstances you may not be able to provide any of the above documents to support your claim, in this case please contact the Deputy President (Finance & Services).

VAT evidence is essential for ICU to reclaim VAT on purchases. You should be diligent in checking this.

If a claim is rejected multiple times for the same reason regarding VAT evidence, without any acknowledgment or attempt to rectify it, you should email the club chair & treasurer. Failing this, if they do not respond, you may decide to code the claim under PN so that the member may get their money back, so long as the claim evidence is sufficient.

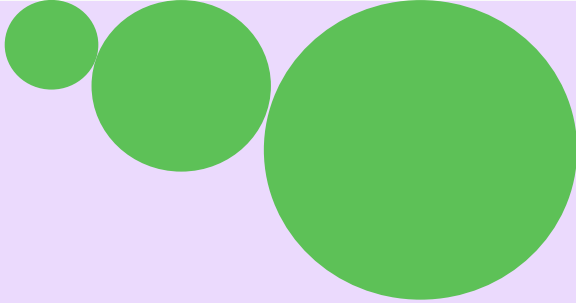
Check out suitable VAT evidence here:

<https://eactivities.union.ic.ac.uk/training/articles/18?collection=101>

For an amount less than £250, the receipt must contain:

- name and address of the supplier
- date of supply
- VAT registration number of the supplier
- description of goods/services purchased
- total, including VAT amount and VAT rate(s)

If the amount is over £250 a VAT receipt should be issued which must have:

- 
- name and address of the supplier
 - date of supply / invoice date
 - unique invoice number
 - VAT registration number of the supplier
 - customer name/address - which must be Imperial College Union, Prince Consort Road, London, SW7 2BB
 - description of goods/services purchased
 - for each good or service supplied the document should show:
 - good/service description
 - VAT rate
 - net unit price
 - quantity
 - total net cost
 - total VAT amount,
 - invoice gross total (including VAT)

Top Tips:

- If a claim is submitted **without suitable evidence** (proof of purchase, proof of payment & VAT evidence) you should **reject it to the creator**.
- If a claim has sufficient evidence, but there is a **financial issue** such as insufficient funds or incorrect VAT coding, you should **reject it to the CSP chair/treasurer**.
- Remember to check the approval history of a claim to ensure that you don't miss any important information such as reasoning for past rejections.
- You should strongly advise against using claims for large expenditure — in the past this has resulted in students being out of pocket for a significant amount of time.

INTERNATIONAL PAYMENTS

International payments are simply a bank transfer outside of the UK. You shouldn't have any issues with these! The approval process is identical to a PO.

CREDIT CARDS

Credit cards are available to make payments under **some circumstances**. They will not be permitted where a PO can reasonably be used. Students requesting to use a credit card must reach out to activities@imperial.ac.uk to discuss the request, including reasoning as to why it is necessary.

IMPRESTS

An imprest is where cash is given to a student to pay for services on behalf of a CSP. Any unused cash must be returned to ICU or else the full amount will be deducted from the club's accounts. **Imprests are almost always the last resort and should not be recommended to CSPs under normal circumstances.**

CHARITABLE DONATIONS

Charitable donations are used to donate money to charity. They have a different eActivities page from a standard PO as there are a lot of regulations surrounding donating money to charity that must be followed, but the process is essentially the same as a PO from a student point of view.

INCOME

(<https://eactivities.union.ic.ac.uk/training/collections/98>)

The following is a summary of some important info and tips regarding income. Please read the training above in full first.

SALES INVOICES

A sales invoice is used when a club wants to sell a good or service. An invoice normally needs to be raised against a purchase order from a customer. Where a purchase order isn't available, a signed contract or written evidence of a payment agreement may be used as evidence.

Remember to check the VAT rates on a sales invoice. Most sales invoices will need to charge VAT at the standard rate (S1 — Sales Standard Rated 20%). Where a club is delivering an event that is deemed by HMRC to be a VAT exempt sport, they may use the SE VAT rate.

SHOP ADMINISTRATION

The shop administration tab is used to put items on the Union online shop. Prices cannot be changed once an item is put on the shop, but quantities and selling dates can.

You should encourage CSPs to use the Union shop to receive all income from members, and never for a club member to take payments directly from another member. When making a shop item, clubs should keep the item as simple and clear as possible. They should avoid making separate items for individual club members.

A club can choose to impose the following restrictions on the sale of an item:

- A maximum purchase quantity.
- A requirement for the payee to have membership to the club.

Additional conditions can be added by ICU Systems Team:

- Age restrictions (e.g., 18+) — if imposing this you should set the maximum purchase quantity to 1, or else an adult member will be able to buy tickets for an under-18.
- Requirement for a previous item to have been bought or not bought

If a club wishes to impose these conditions, they should contact ICU Activities Centre.

As an MG rep, you can view the shop products and sales summaries of all your clubs, however you cannot edit them.

ICU policy states that all ticket sales are refundable, should a student request a refund, unless a clear refund policy/terms and conditions are available at the point of sale. If you would like assistance in coming up with terms and conditions for your event please reach out to ICU Activities Centre or DPCS.

Tips:

- Check your VAT rates and prices before you publish — these cannot be changed!

- Keep shop items as simple as possible. Never make individual items for each student.
- Add a photo — it looks so much better!
- Use HTML tags in your shop description to make it easier to read.
- Even though it looks like you can have HTML tags in the email text, these don't work so please don't use them!

BANKING RECORDS

Banking records are used to record payments into the ICU bank account, so that the money can be placed in a club's account. Evidence of the payment is necessary.

The Union bank details are:	Account Name:	Imperial College Union
	Bank Name:	NatWest Bank
	Account Number:	00618136
	Sort Code:	51-50-01
	IBAN:	GB95NWBK51500100618136
	Swift/BIC:	NWBKGB2L

Where necessary, remittance advice should be forwarded to icu.finance@imperial.ac.uk. This usually won't be necessary if your eActivities submission is sufficient.

CREDIT NOTES

A credit note is used to refund a customer fully or partially. They are used when a club has invoiced a customer for an amount and the amount is now lower (if the new amount is higher, simply raise an additional invoice for the difference).

CARD MACHINES

The student activities team offers card machines for events which can be booked via eActivities.

TRANSFERS

(<https://eactivities.union.ic.ac.uk/training/collections/98>)

The following is a summary of some important info and tips regarding income. Please read the training above in full first.

INTERNAL CHARGE

This is simply you charging, or being charged by, another CSP/staff within the Union. The CSP being charged must approve the internal charge.

MEMBERS FUND REDISTRIBUTION

Members funds are for moving members funds (savings) between activity codes (e.g., Summer Tour to General).

At the end of each year, leftover funds are consolidated into Members Funds (255) under each activity code. This might result in some activity codes having a surplus/deficit, which a members fund redistribution can be used to resolve.

TRANSACTION CORRECTION

A transaction correction moves money from one place to another to rectify mistakes. Funding codes, account codes and activity codes can be changed.

The biggest mistake that people make is thinking they're moving the initial transaction. In fact, transaction corrections move money from one place to another to fix mistakes. You will need to double check that the transaction correction is going in the right direction whenever you approve one.

Additionally, where a transaction correction involves moving from Grant to another funding code, you must insist that a claim/PO/document number for the initial transaction is provided so that you can check that it is grant-fundable.

MEETINGS & COMMUNICATION

MANAGEMENT GROUP MEETINGS

Management group meetings should be held at least once a term. The purpose of MG meetings is to deliver updates to CSP chairs/presidents, to facilitate CSP development and to support CSPs by answering their questions and raising any concerns to the relevant parties, such as at CSPB.

The members of the Management Group Committee are the Management Group Exec and one representative on behalf of each CSP (usually the club chair/president).

The meetings are governed by standing orders (or constitution for CUs). If you can't find your standing orders/constitution, please reach out to the [DPCS](#).

Ideally you will schedule meeting dates ahead of the start of term and aim to schedule them before CSPB meetings so that any issues/concerns can be brought to CSPB.

The secretary should produce and circulate an agenda at least 1 week before a meeting, then minute each meeting and distribute the minutes after the meeting — [Minutes Template](#).

Each MG should hold meetings which report to CSPB, which in turn reports to Union Council.

NEWSLETTERS

It is recommended that you release a newsletter to all CSP committee members. These should complement the weekly activities emails, providing information specific to your CSPs.

It is recommended that you use SUMS to email students. If you would like help please contact the [DPCS](#).

EMAILS

You will each have access to a dedicated role email. This is to allow you to keep your work as a Union volunteer separate from your Imperial College life.

You should ensure that you check this regularly. It is not expected that you are always free to respond to emails, but you should aim to stay on top of all emails from CSPs and ICU staff.

MANAGING YOUR TIME

Being an MG rep can be a time-consuming but rewarding role. You shouldn't compromise on your academic work to fulfil your roles as an MG rep. If you feel like you're struggling to keep on top and would like assistance, please reach out the [Activities Centre](#) or [DPCS](#).

Additionally, you can reach out to the [Advice Centre](#) for free, confidential advice at any time.