

## Activities Forum

### Student Group Annual Budgeting Principles

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## Part 1: Introduction

### 1 Purpose

- (1) This document sets out the principles, agreed by the Activities Forum, by which Grant Funding shall be allocated to clubs and societies during Annual Budgeting.

### 2 Definitions

- (1) “**ICU**” (or the “**Union**”) — Imperial College Union
- (2) “**ICL**” (or the “**University**”) — Imperial College London (Imperial College of Science, Technology & Medicine)
- (3) “**Clubs and Societies**” (or, for this document, “**CSPs**”) are defined as—
  - a. All clubs and societies, as constituted by the *Clubs, Societies & Projects Policy*.
  - b. All Management Groups as constituted in *Bye-Law A*.
  - c. All Constituent Unions as constituted in *Bye-Law L*.
- (4) “**Annual Budgeting**” is the process in which clubs and societies create a budget, and where Grant Funding is provided yearly to eligible clubs and societies.
- (5) “**Grant Funding**” is funding allocated by ICU as part of the Annual Budgeting process.
- (6) “**College Funding**” is any funding (in the form of a grant or donation) received directly by a CSP from the University, a subsidiary of the University, or trust controlled or administered by the University. For the avoidance of doubt, College Funding includes, but is not limited to, funding received from the—
  - a. Imperial College Trust
  - b. Harlington Fund
  - c. Move Imperial
  - d. Blyth Centre
  - e. University departments
  - f. University faculties
  - g. University management.
- (7) “**Core Activity**” is all activities of a CSP which are accessible to, and benefit, a majority of the CSP’s membership, in line with the CSP’s aims and objectives, as interpreted by the Activities Manager(s) and Deputy President (Activities).
- (8) “**Non-core Activity**” is any other activity which a CSP carries out which is not defined under Core Activity.
- (9) “**SGI**” (Self-generated Income) is income generated by a CSP other than Grant Funding or College Funding.
- (10) “**Surplus**” refers to any additional income that exceeds expenditures in the budget.

- (11) “**Annual Budgeting Committee**” (or the “**ABC**”) is the Committee responsible for allocating Grant Funding, as constituted in the *Student Group Funding Policy*.

### **3 Responsibilities**

- (1) The Activities Forum is responsible for setting the principles by which Grant Funding is allocated.
- (2) The Activities Team, alongside the Deputy President (Activities), will provide training and resources for student groups on the annual budgeting process.
- (3) The Annual Budgeting Committee, as constituted in the *Student Group Funding Policy*, is responsible for allocating Grant Funding in accordance with the principles set out in this document.
- a. The Annual Budgeting Committee will consist of the Deputy President Activities, Activities Manager (Operations), and the Activities Coordinator (Finance).
  - b. The Director of Membership Services may contribute towards any strategic decisions associated with annual budgeting.

## Part 2: General Principles

### 4 General Principles

- (1) General principles, as defined in this part (**Part 2: General Principles**) shall apply to all clubs and societies.
- (2) A club or society's constitution shall not influence the decision-making process.

### 5 Core Activity

- (1) Grant Funding shall only be provided for Core Activity.

### 6 External Funding

- (1) External funding shall not impact a group's eligibility for Grant Funding, except where providing Grant Funding will cause the group to generate a surplus after covering core expenditure, in which case the Grant Funding shall be capped or rejected as to prevent a surplus.

### 7 Equitability

- (1) Where applicable, Grant Funding shall be allocated equitably between groups with the same expenses.
- (2) Any group with the same or comparable expense which has been deemed to be eligible for Grant Funding (in line with these principles) shall—
  - a. Receive the same amount of funding if the expense is fixed.
  - b. Receive an amount of Grant Funding proportional to the number of students impacted by the Grant Funding, if the expense is variable.

### 8 Prioritisation

- (1) In consideration of Section 7 (**Equitability**), Grant Funding allocations shall be prioritised, in order of priority, based upon—
  - a. Need: Funding allocated based on a CSP needing the funds to run Core Activity.
  - b. Reach: Funding allocated based on the number of Imperial students reached. If the reach of the group increases past its target members, the group should investigate funding opportunities separate to Annual Budgeting, such as the Activity Development Fund.
  - c. Merit: Funding allocated based on it providing a unique aspect of the student experience.
  - d. Context: Funding allocated based on the wider context of ICU's constitutional aims and strategy.

### 9 Funding Restrictions

- (1) Grant Funding will not be provided for:
  - a. Any activity that sits outside a club or society's core aims and objectives.

- b. Any expenses prohibited by the *Student Group Funding Policy*.
- c. Fines.
- d. Costs charged by one group to another, except where doing so reduces the cost a group would be charged by an external supplier.
  - i. Where a CSP charges another CSP, in order to reduce the cost compared to an external supplier, the CSP charging must ensure that the cost charged is the lowest feasible to break even.

## **10 Large Equipment Expenditure & Capital Expenditure**

- (1) Grant Funding will not normally be allocated for equipment purchases which exceed £10,000, or for capital expenditure projects as decided by the Annual Budgeting Committee.

## **11 Purchase of Equipment and Maintenance Costs**

- (1) Equipment is defined as—
  - a. Any purchase where individual units normally last for at least one academic year.
  - b. For the avoidance of doubt, equipment for Sports includes playing kit.
- (2) Maintenance costs are defined as—
  - a. Any purchase required to keep equipment (as defined above) in good, functioning order.
- (3) Equipment which is eligible for Grant Funding shall be funded up to **50%** of the total cost.
- (4) Funding of maintenance costs shall be eligible for Grant Funding on a rolling basis, with costs funded in equal amounts every academic year, to maintain a status quo.
- (5) Maintenance costs which are eligible for Grant Funding shall normally be funded up to **50%** of the total cost.
- (6) Where maintenance provides a more sustainable option to new equipment purchase, maintenance should be encouraged.
- (7) If financially and ethically sustainable, renting equipment will be eligible for Grant Funding in line with equipment cost principles.

## **12 Purchase of Consumables**

- (1) Consumables are defined as—
  - a. Items where individual units are expected to last for at most one academic year.
- (2) Consumables which are eligible for Grant Funding shall normally be funded up to **50%** of the total cost.
- (3) Consumables which pertain to health and safety considerations for Core Activity shall be funded at up to **100%** of the total cost.

### **13 Storage of Equipment**

- (1) Storage of equipment shall not normally be eligible for any Grant Funding.
- (2) Where only external, paid storage is necessary to store equipment for Core Activity, the CSP shall be eligible for Grant Funding at up to **40%** of the total cost.

### **14 Transport to Core Activity (Excluding Personal Vehicle or Minibus)**

- (1) Grant Funding for transport to Core Activity shall be funded up to **40%** of the total cost.
- (2) Eligibility for grant funding for transport to Core Activity shall be contingent on the CSP procuring the cheapest reasonable transport option, including the use of railcards and group-save discounts.
- (3) Grant Funding will not be provided for individual student transport.
  - a. Mass transit of individuals on public transport shall remain eligible.
- (4) A portion of Grant Funding for transport to Harlington will be allocated alongside Move Imperial to subsidise costs for students travelling to training and fixtures.

### **15 Transport via Personal Vehicle or Minibus**

- (1) Where transport via a personal vehicle or Union-provided minibus is required for Core Activity—
  - a. ICU minibus/van hire shall be eligible for Grant Funding up to **50%** of the total cost.
  - b. Fuel for minibuses shall be eligible for Grant Funding for up to **50%** of the total cost.
  - c. Fuel for personal vehicles, where no other alternative is available, shall be eligible for Grant Funding for up to **40%** of the total cost.

### **16 Accommodation for Core Activity**

- (1) Accommodation required for Core Activity, where strictly necessary, shall be eligible for Grant Funding for up to **£20 per person, per night**.

### **17 Training, Insurance and Affiliation**

- (1) Funding for training, including specialist courses (e.g. health & safety) and club or society-specific training required for Core Activity, shall be eligible for Grant Funding of up to **50%** of the total cost.
  - a. All requests must include strong justification outlining how the training supports the club or society's Core Activity and benefits its members.
  - b. Where funding is provided for individual members, or less than 10% of the total membership, additional justification must be provided demonstrating the impact on the wider membership.

- c. Funding will only be provided for those who require the training, as justified by the group, and can only be provided to Full Members of the Union.
  - d. In exceptional cases where the training is **strictly** necessary for the delivery of Core Activity, such as for health and safety in a high-risk group, up to **100%** funding may be considered.
  - e. Where ground hire is required for training, this shall be eligible for Grant Funding for up to **40%** of the total cost.
- (2) Insurance and affiliations, without which Core Activity would not be possible, shall be eligible for Grant Funding of 100% of the total cost.
- a. This clause does not apply to Sports Clubs that are part of Imperial Athletes and thus covered under ICU's insurance.
  - b. Where practicable, these shall be exempt from scaling.
- (3) Competition entries for Core Activity shall be eligible for Grant Funding for up to **50%** of the total cost.
- a. Only competitions core to a club or society's activity shall be funded.
  - b. Funding for competitions shall be capped to a maximum of three per year.
  - c. All funding requests for competitions must be justified in relation to their reach across a group's total membership.

## **18 Reserves Justification**

- (1) Any group with SGI reserves in excess of £10k at the time of Annual Budgeting expenditure submission shall be required to submit a reserves justification form.
- a. The Annual Budgeting Committee reserves the right to require a reserves justification from any group.
  - b. All groups who are required to submit a reserves justification shall be contacted by the Annual Budgeting Committee prior to the Annual Budgeting expenditure submission deadline to do so.
  - c. SGI reserves should not exceed £25k at the end of the academic year. Any groups exceeding this should consider creating a Designated Members Funds (DMF) account, or budget to reduce the reserves.
- (2) Debt shall not impact a group's eligibility for Grant Funding, provided they have an approved debt management plan.
- a. A debt management plan provides guidance and structure for groups to reduce the amount of debt, with the goal of ending the year on a positive balance wherever possible.
- (3) Any group with a DMF shall be required to submit a reserves justification form.
- a. DMFs shall not impact a group's eligibility for Grant Funding.

- (4) Any group which fails to submit a reserves justification form where required may be deemed to be in breach of the *Student Group Funding Policy* and subject to a reduced Grant Funding allocation.

## **19 Scaling**

- (1) Where the total allocation across groups exceeds, or is expected to exceed, the amount available for the Annual Budgeting round, the Annual Budgeting Committee reserves the right to scale—
- a. The allocation of every group, uniformly.
  - b. A group of lines with similar purposes, using the principles outlined in sections 7 (**Equitability**) and 8(1) (**Prioritisation**).
  - c. The allocation of a subset of groups, using the principles outlined in section 7 (**Equitability**).
- (2) Where practicable, and when explicitly mentioned in these principles, certain lines should be exempt from scaling, such as 17(2).

## Part 3: Specific Principles

### 20 Specific Principles

- (1) Specific principles, as defined in this Part (**Part 3: Specific Principles**) shall apply only to the clubs and societies which fall into each Category as defined in **SCHEDULE 1: CSP Categorisations**.
- (2) Should a club or society not be categorised in **SCHEDULE 1: CSP Categorisations**, the Annual Budgeting Committee shall request that the Activities Forum make a determination as to which Category a club or society falls within.

### 21 Sports Groups (Category A)

- (1) **Facilities and travel to training sessions and home matches** shall be funded in accordance with the below.
  - a. Where Ethos is used, the club shall be eligible for Grant Funding for facilities at up to **40%** of the total cost. The club shall not be eligible for funding for travel to Ethos.
  - b. The Annual Budgeting Committee shall reserve funding to subsidise transport to Harlington to lower costs to students traveling for training and fixtures. This will be dependent on estimated costs and subsidies applied by Move Imperial.
  - c. Where an external venue (i.e., not Ethos or Harlington) is used, detailed justification must be provided as to the benefit of an external venue over Imperial-provided venues. If appropriate, the club or society shall be eligible for Grant Funding for facilities at up to **40%** of the total cost. Grant Funding shall not be provided for travel to the external venue.
- (2) **Instructors and coaches** (shortened to “coaches”).
  - a. Coaches for Core Activity are eligible for Grant Funding.
  - b. Clubs with—
    - i. Up to 2 teams shall be eligible for Grant Funding for up to 6 coaching hours per week.
    - ii. Up to 4 teams shall be eligible for Grant Funding for up to 12 coaching hours per week.
    - iii. Over 4 teams shall be eligible for Grant Funding for up to 18 coaching hours per week.
  - c. Coaching hours may be split across more than one coach.
  - d. Coaches which are eligible for Grant Funding shall be eligible for funding for up to **50%** of the total cost.
  - e. Coaching hours which are eligible for Grant Funding shall be capped at a maximum of £40 per hour.
    - i. Justification must be provided as to the coaching hours and number of coaching weeks in an academic year.
    - ii. Coaches cannot be funded outside of term time, or after competition finishes.
  - f. Coaching hours and rates must be approved by the Activities Team.

- (3) **Affiliations to national governing bodies.**
- a. Club affiliations to national governing bodies which are mandatory for Core Activity shall be eligible for Grant Funding of up to **100%** of the total cost.
  - b. Team affiliations or entries which are mandatory for Core Activity shall be funded up to **100%** of the total cost.
  - c. Team entries shall be subject to approval of the Annual Budgeting Committee and Move Imperial.
- (4) **Match-day officials** (e.g. referees, first-aiders or umpires) **and competition entries.**
- a. Competition costs shall be capped to one per team throughout the year.
  - b. Teams that compete in multiple competitions shall fund this through SGI.
  - c. Match-day officials shall be eligible for Grant Funding where required for Core Activity.
    - i. Grant Funding shall only be provided for home fixtures.
    - ii. Grant Funding for match-day officials shall be funded up to **70%** of the total cost.
- (5) Groups that choose to participate in sport that is not linked to their Core Activity shall not receive Grant Funding for any of the above.

## 22 Performance (Category B)

### (1) Performance opportunities.

- a. Performance opportunities for Core Activity shall be eligible for Grant Funding dependent upon their reach.
- b. Ground hire for performance opportunities shall be eligible for Grant Funding of up to **40%** of the total cost, provided that the venue is a suitable size and cost for Core Activity, and that suitable justification is provided.
  - i. Where possible, societies should endeavour to use ICU/ICL facilities.
- c. Hire of equipment and rights for performance opportunities shall be eligible for Grant Funding of up to **50%** of the total cost.
- d. Consumables for performance opportunities shall not be eligible for Grant Funding.

### (2) Hiring of Instructors and Performers.

- a. Hiring of instructors required for Core Activity shall be eligible for Grant Funding.
  - i. Professional coaches and instructors, where required for Core Activity, shall be eligible for Grant Funding of up to **50%** of the total cost, of a maximum of £40 per hour.
- b. Hiring of professional performers for Core Activity shall only be eligible for Grant Funding where members of the club or society cannot perform the role.
  - i. Soloists and other external performers shall be eligible for Grant Funding of up to **10%** of the total cost, where justification as to why a student cannot perform is provided.

## **23 Academic-related, Culture and Community (Category C)**

### **(1) Fostering community and belonging.**

- a. Initiatives and events within a club or society which foster community and belonging shall be eligible for Grant Funding.
- b. Up to **30%** of the cost shall be eligible for Grant Funding.

### **(2) Flagship event.**

- a. One flagship event per year shall be eligible for Grant Funding.
- b. All flagship events should have run for at least one year, with reasonable justification given to its future running.
  - i. If the event is new, the club or society should instead apply for the Activity Development Fund.
- c. The flagship event expenses which are normally eligible for Grant Funding are—
  - i. Ground hire for flagship events shall be eligible for Grant Funding of up to **40%** of the total cost, provided that the venue is a suitable size and cost for Core Activity, and sufficient justification is provided.
    - (a) Where possible, a club or society should endeavour to use ICU/ICL facilities.
  - ii. Consumables (e.g. wristbands) at up to **30%** of the total cost.
- d. Grant Funding shall not be provided for—
  - i. The purchase of hospitality, including any food and drink, unless for cultural reasons.
    - (a) Societies organising flagship events that involves food for cultural reasons may be eligible for Grant Funding of up to **50%**.
    - (b) Grant Funding shall never be provided for alcohol.
  - ii. Speaker fees.

### **(3) Attendance at external, ticketed events.**

- a. Where strictly part of a group's Core Activity, entry costs to external events, such as concerts and theatre trips, shall be eligible for Grant Funding at up to **10%** of the total cost.

## **24 Constituent Unions and Departmental Societies (Category D)**

### **(1) Fostering community and belonging within a department or faculty.**

- a. A variable allocation of Grant Funding shall be provided to each Constituent Union and Departmental Society for the purpose of fostering community and belonging.
  - i. Constituent Unions shall receive a fixed base allocation, as well as an allocation per member.
  - ii. Departmental Societies shall receive an allocation per member.

### **(2) Printing costs for publications.**

- a. Printing costs for publications (e.g., Guildsheet, Broadsheet, Gazette, and The Pit), shall be eligible for Grant Funding of up to **30%** of costs.

### **(3) Super-curricular academic events.**

- a. Where a club or society's Core Activity includes super-curricular academic events, these shall be eligible for Grant Funding.
- b. Super-curricular academic events are defined as—
  - i. Hosting mock examinations or teaching sessions.
  - ii. Hosting academic and industry talks, careers fairs, and networking events.
  - iii. Mentoring events with respective CU alumni.
    - (a) Grant Funding for super-curricular academic events shall be provided at up to **30%** of the total cost, where sufficient justification is provided.

## **Part 4: Usage, Interpretation and Approval**

### **25 Usage**

- (1) These principles are intended to be used in conjunction with the *Student Group Funding Policy*, which sets out ICU's general approach to student group funding.
- (2) These principles are to be followed by the Annual Budgeting Committee (ABC), as defined in the *Student Group Funding Policy*, with the Deputy President (Activities) responsible for ensuring compliance with these principles.

### **26 Interpretation**

- (1) Where these principles may conflict with the *Student Group Funding Policy*, the *Student Group Funding Policy* shall take absolute precedence.

### **27 Approval and Amendments**

- (1) These principles shall be renewed and re-approved by the Activities Forum each academic year, prior to the commencement of Annual Budgeting.
- (2) Approval of these principles shall be made by a 50% +1 majority of the Activities Forum.
- (3) Amendments may be made to these principles after the commencement of Annual Budgeting, but strictly before any grant allocation by the Annual Budgeting Committee has been made.
  - a. Amendments after the commencement of Annual Budgeting must be made by a 2/3 majority of the Activities Forum.

## SCHEDULE 1: CSP Categorisations

### 28 Categories

- (1) **Sports (Category A)** is comprised of—
  - a. All CSPs within Sports Sector.
  - b. All sports CSPs within ICSMSU.
  - c. All sports CSPs within RSMU.
  - d. All CSPs within Arts & Entertainments (Dance) Sector.
  
- (2) **Performance (Category B)** is comprised of—
  - a. All CSPs within Arts & Entertainments (Entertainment) Sector.
  - b. All CSPs within Arts & Entertainments (Music — Instrumental) Sector.
  - c. All CSPs within Arts & Entertainments (Music — Vocal) Sector.
  - d. All CSPs within Arts & Entertainments (Media) Sector, except for Felix.
  - e. All performance CSPs within ICSMSU.
  
- (3) **Academic-related, Culture & Community (Category C)** is comprised of—
  - a. All CSPs within Knowledge Sector.
  - b. All CSPs within Culture Sector.
  - c. All CSPs within Community Sector.
  - d. All CSPs within ICSMSU, except for sports and performance CSPs, and Departmental Societies.
  - e. All CSPs within RSMU, RCSU, and CGCU, except for Departmental Societies.
  - f. All CSPs within Recreation (Appreciation).
  - g. The vintage vehicle motor clubs for CGCU, RCSU, and RSM.
  
- (4) **Constituent Unions and Departmental Societies (Category D)** is comprised of—
  - a. Royal College of Science Union (RCSU).
  - b. City and Guilds College Union (CGCU).
  - c. Royal School of Mines Union (RSMU).
  - d. Imperial College School of Medicine Students' Union (ICSMSU).
  - e. Silwood Park Students' Union (SPSU).
  - f. All departmental societies.