

## The Constitution of Students' Union UCL

### Economics and Finance Society

#### 1. Name

- 1.1. The name of the club/society shall be Students' Union UCL Economics and Finance Society.
- 1.2. The club/society shall be affiliated to Students' Union UCL.

#### 2. Statement of Intent

- 2.1. The constitution, regulations, management and conduct of the club/society shall abide by all Students' Union UCL policy, and shall be bound by the [Students' Union UCL Memorandum & Articles of Association, Byelaws, Club and Society Regulations](#) and the club and society procedures and guidance – laid out in the '[how to guides](#)'.
- 2.2. The club/society stresses that it abides by Students' Union UCL Equal Opportunities Policies, and that club/society regulations pertaining to membership of the club/society or election to the club/society shall not contravene this policy.
- 2.3. The Club and Society Regulations can be found on the following webpage: <http://studentsunionucl.org/content/president-and-treasurer-hub/rules-and-regulations>.

#### 3. The Structure of the Society Committee

- 3.1. The Society Committee shall be comprised of a Leadership Committee, a Mentorship & Technology Committee, an Executive Committee, and a Bloomsbury Capital Committee.
- 3.2. The Leadership Committee shall be comprised of the President, the Treasurer, Welfare Officer, Vice President of Business, Vice President of Client Relations, Vice President of Economics, Vice President of Finance, Vice President of Marketing, Vice President of Socials and Vice President of Alumni Relations.
- 3.3. The Mentorship and Technology Committee shall be comprised of the Vice President of Mentorship and the Vice President of Technology.
- 3.4. The Executive Committee shall be comprised of committee members who are also known as 'executive' who will support the seven elected Vice Presidents and the two appointed Vice Presidents.

#### 4. Committee Rules and Regulations

- 4.1. The President, Treasurer, Welfare Officer, Vice President of Business, Vice President of Client Relations, Vice President of Economics, Vice President of Finance, Vice President of Marketing, Vice President of Socials and Vice President of Alumni Relations must always be elected through a democratic election process.
- 4.2. They shall be elected yearly online through the Student Union's website in Term 2.
- 4.3. The Vice President of Mentorship and Vice President of Technology will be appointed through a standard and transparent application process.
- 4.4. The Executive Committee will be appointed through a standard and transparent application process.

#### 5. Leadership Committee

## **5.1. President**

5.1.1. The President's primary role is laid out in section 5.7 of the Club and Society Regulations.

## **5.2. Treasurer**

5.2.1. The Treasurer's primary role is laid out in section 5.8 of the Club and Society Regulations.

5.2.2. The Treasurer also takes the position of executive director and will uphold the same responsibilities as the President with regards to the well-functioning of the society

5.2.3. Set the society's annual budget.

## **5.3. Welfare Officer**

5.3.1. The welfare officer's primary role is laid out in section 5.9 of the Club and Society Regulations.

## **5.4. Vice President of Client Relations**

5.4.1. Works closely with the President to ensure that the Society attracts the most prestigious sponsors from across the financial sector. The Client Relations VP will need to draw up sponsorship proposals, pitch to potential sponsors, and manage the relationships with sponsors throughout the year. The Client Relations VP will also work closely with other VPs to organise any relevant corporate events. The Client Relations VP will lead a team of client relations executives throughout the year.

## **5.5. Vice President of Finance**

5.5.1. Responsible for the organisation of Investment Banking, Asset Management, Alternative Investment (such as Private Equity, Hedge Fund, Real Estate, Infrastructure and Private Debt) events as well as providing the Client Relations VP with help with sponsorship deals. The Finance VP will lead a team of finance executives throughout the year to work on organisation and execution of events.

## **5.6. Vice President of Economics**

5.6.1.1. Responsible for the organisation of economics and academic events including The Economist's Symposium. The role also involves hosting renowned economists and exploring the interdisciplinary nature of the subject through competitions and collaborations with other societies and institutions. They will be responsible for leading a team of economics executives throughout the year.

## **5.7. Vice President of Business**

5.7.1. Responsible for leading a team of executives concentrating on the organisation of events relating to consulting, entrepreneurship, venture capital and other business careers. As well as this, the Business VP would be responsible for organising and hosting the London Student Bootcamp and the Consulting Bootcamp. The Business VP will lead a team of business executives throughout the year.

## **5.8. Vice President of Marketing**

5.8.1. Responsible for all marketing of the society and its events, as well as managing the marketing team. The position will include being responsible for the social media content, mailing list, weekly newsletter, freshers stand, developing the membership base, advertising all events around campus. The Marketing VP will lead a team of marketing executives throughout the year.

## **5.9. Vice President of Socials**

5.9.1. Responsible for organising and running EFS social events, including Fresher events and other events not covered by other Division heads. Works closely with the rest of the committee to provide top level social events for the society members to socialise beyond EFS' core career and academic events. The Socials VP will head a team of social executives throughout the year.

## **5.10. Vice President of Alumni Relations**

- 5.10.1. Responsible for building a strong network with EFS Alumni. Importantly, they will always be working with other divisions to make the alumni outreach as relevant to the upcoming event as possible. You have numerous tasks, including the management of the LinkedIn Alumni group chats, and the organisation of events such as Alumni Dinners and Panels for EFS members and mentees, again, through working with all other divisions.
- 5.11. The committee members shall perform the roles as described in section 5 of the Students' Union UCL Club and Society Regulations.
- 5.12. Committee members are elected to represent the interests and well-being of club/society members and are accountable to their members. If club/society members are not satisfied by the performance of their representative officers they may call for a motion of no-confidence in line with the Students' Union UCL Club and Society Regulations.

## 6. Mentorship and Technology Committee

### 6.1. Vice President of Mentorship

- 6.1.1. The UCL EFS Mentorship Programme: The VP of Mentorship will oversee the society's Mentorship programme, which will include several tasks such as selecting mentors (30-50 typically), recruiting the mentees (mentee cohort size ranges from 60-80 typically), assigning mentors and acquiring & creating resources for the mentees.
- 6.1.2. The group chats: A key responsibility is to oversee all the EFS Whatsapp group chats, which includes monitoring the chat, creating new chats when required, answering any questions, and sending regular updates on new opportunities, such as company events, opening of summer internships and spring weeks.
- 6.1.3. The VP of Mentorship will host several events related to internships across the year. The type of events might include, but is not limited to, workshops, panel events with previous spring and summer interns, networking events and spring week related events such as "How to get a Spring Week"/"How to convert your spring week".
- 6.1.4. The VP of Mentorship will lead a team of executives throughout the year who will help the VP in holding events and organising the different initiatives.

### 6.2. Vice President of Technology

- 6.2.1. The Vice President of Technology will manage the website and email of the society.
- 6.2.2. The Vice President of Technology will work closely with the other vice presidents to facilitate their work through the use of technology.
- 6.2.3. The Vice President of Technology will improve the experience of the society's members through the use of technology.
- 6.2.4. The VP of Technology will lead a team of executives throughout the year who will help the VP to manage their duties.

## 7. Executive Committee

- 7.1. The executives will help the elected as well as the appointed Vice Presidents with their tasks and duties as mentioned above.

## 8. Bloomsbury Capital Committee

- 8.1. Bloomsbury Capital VP: Chair of the Bloomsbury Capital Investment Fund (sub-division of EFS). Responsible to the EFS President and Treasurer for all aspects of the fund's management (details of this can be found in the Bloomsbury Capital Charter). The Chair and Committee of Bloomsbury Capital will be elected, or appointed, in line with current Students' Union UCL regulations.

## 9. Terms, Aims and Objectives

- 9.1. The club/society shall hold the following as its aims and objectives.
- 9.2. The aims and objectives are to:
  - 9.2.1. Helping members gain insight into careers in banking, finance, consulting, asset management, private equity, hedge fund, real estate, venture capital, economics and entrepreneurship.
  - 9.2.2. Helping students get internships and jobs in the industries mentioned above
  - 9.2.3. Partnering with sponsor firms to hold events, workshops and networking events
  - 9.2.4. Upskilling students through hosting technical workshops and events
  - 9.2.5. Connecting current members of the society with UCL alumni and hosting socials to connect current members
- 9.3. The club/society shall strive to fulfil these aims and objectives in the course of the academic year as its commitment to its membership.
- 9.4. The core activities of the club/society shall be:
  - 9.4.1. Organise a range of Economics related events with a variety of prestigious speakers.
  - 9.4.2. Organise the Investment Banking Conference and the Alternative Investment Series
  - 9.4.3. Organise the London Student Bootcamp and Consulting Bootcamp
  - 9.4.4. Provide opportunities for members to socialise and meet with likeminded people.
  - 9.4.5. Organise the Mentorship Scheme
  - 9.4.6. Provide skills sessions and CV workshops.
  - 9.4.7. Raise awareness of relevant off campus events and internship opportunities.
- 9.5. This constitution shall be binding on the club/society officers, and shall only be altered by consent of two-thirds majority of the full members present at a club/society general meeting, or via a Students' Union UCL online referendum. The Activities Executive shall ratify any such alterations.
- 9.6. This constitution has been approved and accepted as the Constitution for the Students' Union UCL Economics and Finance Society. By signing this document the president and treasurer have declared that they have read and abide by the Students' Union UCL Club and Society Regulations.
- 9.7. All matters pertaining to Bloomsbury Capital and its operations and governance can be found in Appendix 5: 'Bloomsbury Capital Charter', acknowledged and accepted by the EFS as an extension to this constitution.

# Appendix

## Recruitment Process and Criteria

### General Considerations

**All applicants must be a current UCL student and a full member of UCL EFS at the time of application and for duration of post, if successful.**

### **Leadership, communication and teamwork**

Being part of the UCL EFS Committee will require working with other members within the team as well as collaborating with societies both in and outside of UCL. Candidates must be goal-oriented and perform tasks under pressure while working in teams. Sound communication skills and good organisation skills are highly valued to ensure swift execution of events. It is important that interviewees articulate their answers and present them in a succinct and presentable manner. Vice Presidents must show examples of good leadership skills.

### **Motivation**

Vice Presidents and Executives will be involved in the organisation of many different events and they must have a strong passion towards both the finance, economics and/or consulting industry and the planning and execution of events. It is important that interviewees present their goals and motivations for applying for the position and for it to align with EFS's mission.

### **Creativity and open-mindedness**

This position will require hosting meaningful and informative events that pique the interest of EFS members. Demonstrating good ideas and the ability to think outside of the box will be valued as it will enable Vice Presidents and Executives to better plan beneficial events that better prepare members for their future careers in the industry.

### **EFS Values**

Candidates must strive for inclusivity, social mobility and diversity. They must follow our values which are:

- Integrity (we adhere to strong ethical and moral principles with a zero-tolerance policy)
- Inclusivity (we strive to make everyone feel respected)
- Collaboration (the EFS community fosters friendship and loyalty)
- Ownership (we take accountability for our actions or mistakes)
- Commitment (we are committed in putting our members first)

## **Vice President of Mentorship**

VP of Mentorship will be appointed through an application process that will consist of two rounds:

- 1) A first round containing an application form which will ask for the applicant's CV, contact details and answers for a set of short questions formulated by the President and Current VP of Mentorship.
- 2) A second round consisting of an interview. The set of interview questions will be agreed by the President and Current VP of Mentorship prior to the recruitment process, and all candidates will be asked questions from the same question bank.

All candidates will be informed of whether they have been invited to an interview or not. Following interviews, all candidates will be informed whether they are to be offered the position or not.

The recruitment for VP of Mentorship will occur during March to May. Additional applications could be done at a later date if the position is not filled, or if the VP of Mentorship has stepped down.

Criteria listed are subject to future changes and will be disseminated to eligible members accordingly.

The CV, questions and interviews will be assessed and conducted by at least two people which will include any of the following:

- President
- Treasurer
- Welfare Officer
- Current Vice President of Mentorship
- Current Mentorship Executives

The criteria that their CV, questions and interviews will be assessed on will be based on the following:

### **Screening Criteria for VP of Mentorship**

- Received at least one spring week offer
- Actively applied to spring weeks and shows knowledge of the spring week application process
- Showed involvement in the society by attending events & being active in the group chats
- Helpful, creative and committed individual

## Candidate Scoring Criteria

	1 (Best)	2	3	4	5 (Worst)
Motivation	<p>The individual shows a <b>high level of enthusiasm and motivation</b> with genuine reasons to help others and become the Mentorship VP.</p> <p>Show a strong interest in the finance, technology, or consulting industries.</p> <p>High level of communication and leadership skills.</p>	<p>Shows good motivation and enthusiasm for the role.</p> <p>Shows a good interest in an industry.</p> <p><b>Good communication and leadership skills.</b></p>	<p>Shows sufficient motivation and enthusiasm for the role. Shows a sufficient interest in an industry.</p> <p><b>Sufficient communication and leadership skills.</b></p>	<p>Shows little enthusiasm and motivation for the role. Shows minimal interest in any industry.</p> <p><b>Low communication and leadership skills.</b></p>	<p>Enthusiasm and motivation for the role are very poor. Shows no interest in any industry.</p> <p><b>No communication and leadership skills.</b></p>
Knowledge	<p>The individual shows that they have an excellent understanding of the Spring Week Application process, with an understanding of the type of tests there are, interview questions one might be asked and how to create effective CVs and CLs.</p>	<p>Shows good understanding of the spring week application process.</p>	<p>Shows sufficient understanding of the spring week application process.</p>	<p>Shows little understanding of the spring week application process.</p>	<p>Shows no understanding of the spring week application process.</p>

If two or more candidates received the highest score then the Current VP of Mentorship, President and Treasurer will have a final say on who to appoint.

## **Vice President of Technology**

VP of Technology will be appointed through an application process that will consist of two rounds:

- 1) A first round containing an application form which will ask for the applicant's CV, contact details and answers for a set of short questions formulated by the President and Current VP of Technology.
- 2) A second round consisting of an interview. The set of interview questions will be agreed by the President and Current VP of Technology prior to the recruitment process, and all candidates will be asked questions from the same question bank.

All candidates will be informed of whether they have been invited to an interview or not. Following interviews, all candidates will be informed whether they are to be offered the position or not.

The recruitment for VP of Technology will occur during March to May. Additional applications could be done at a later date if the position is not filled, or if the VP of Technology has stepped down.

Criteria listed are subject to future changes and will be disseminated to eligible members accordingly.

The CV, questions and interviews will be assessed and conducted by at least two people which will include any of the following:

- President
- Treasurer
- Welfare Officer
- Current Vice President of Technology
- Current Technology Executives

The criteria that their CV, questions and interviews will be assessed on will be based on the following:

### **Screening Criteria for VP of Technology**

- Demonstrates strong understanding of at least one Javascript coding language (Java etc) and one backend coding language (Java, Python etc)
- Has relevant experience in web design and running of web pages, preferably with portfolio in app and web apps
- Demonstrates ways and ideas of improving the experience of society members through the use of technology
- Showed involvement in the society by attending events & being active in the group chats
- Helpful, committed and creative individual



## Candidate Scoring Criteria

	1 (Best)	2	3	4	5 (Worst)
Motivation	<p>The individual shows a <b>high level of enthusiasm and motivation</b> with genuine reasons to help others and become the Technology VP.</p> <p>Show a strong interest in the finance, technology, or consulting industries.</p> <p>High level of communication and leadership skills.</p>	<p>Shows good motivation and enthusiasm for the role.</p> <p>Shows a good interest in an industry.</p> <p><b>Good communication and leadership skills.</b></p>	<p>Shows sufficient motivation and enthusiasm for the role. Shows a sufficient interest in an industry.</p> <p><b>Sufficient communication and leadership skills.</b></p>	<p>Shows little enthusiasm and motivation for the role. Shows minimal interest in any industry.</p> <p><b>Low communication and leadership skills.</b></p>	<p>Enthusiasm and motivation for the role are very poor. Shows no interest in any industry.</p> <p><b>No communication and leadership skills.</b></p>
Knowledge	<p>The individual shows that they have an excellent understanding of web design and technology implementation, with expertise in automation of basic tasks such as email sending.</p> <p>Has prior experience running a website or mobile app.</p>	<p>The individual shows that they have a good understanding of web design and technology implementation, with experience in automation of basic tasks such as email sending.</p>	<p>The individual shows that they have sufficient understanding of web design and technology implementation, with an understanding of automation of basic tasks such as email sending.</p>	<p>The individual shows that they have basic understanding of web design and technology implementation, with little to no knowledge of automation of basic tasks such as email sending.</p>	<p>The individual shows that they lack understanding of web design and technology implementation, with no knowledge of automation of basic tasks such as email sending.</p>

If two or more candidates received the highest score then the Current VP of Technology, President and Treasurer will have a final say on who to appoint.

## Selection process for Executives

Executives will be appointed through an application process that will consist of two rounds:

- 1) A first round containing an application form which will ask for the applicant's CV, contact details and answers for a set of short questions formulated by the President and relevant Vice President. For Marketing Executives, they might be asked for an advert.
- 2) A second round consisting of an interview. The set of interview questions will be agreed by the President and relevant Vice President prior to the recruitment process, and all candidates will be asked questions from the same question bank.

All candidates will be informed of whether they have been invited to an interview or not. Following interviews, all candidates will be informed whether they are to be offered the position or not.

The recruitment for executives will occur during Easter Holidays and/or Term 3. Additional applications could be done at a later date if the position is not filled, or if current executives have stepped down. Each Vice President will recruit for a maximum of three executive positions.

Criteria listed are subject to future changes and will be disseminated to eligible members accordingly.

The CV, questions and interviews will be assessed and conducted by at least two people which will include any of the following:

- President
- Treasurer
- Welfare Officer
- Relevant Vice President
- Current Executives from relevant department

If two or more candidates received the highest score then the current relevant VP, President and current relevant executives will have a final say on who to appoint.

Criteria for the following departments are shown below:

## Mentorship Executive

### Screening Criteria

- Received at least one spring week offer
- Actively applied to spring weeks and shows knowledge of the spring week application process
- Helpful and committed individual

### Candidate Scoring Criteria

	1 (Best)	2	3	4	5 (Worst)
Motivation	The individual shows a <b>high level of enthusiasm and motivation</b> with genuine reasons to help others.  High level of communication skills.	Shows good motivation and enthusiasm for the role.  <b>Good communication skills.</b>	Shows sufficient motivation and enthusiasm for the role.  <b>Sufficient communication skills.</b>	Shows little enthusiasm and motivation for the role.  <b>Low communication skills.</b>	Enthusiasm and motivation for the role are very poor..  <b>No communication skills.</b>
Knowledge	The individual shows that they have an excellent understanding of the Spring Week Application process.	Shows no understanding of the spring week application process.	Shows sufficient understanding of the spring week application process.	Shows little understanding of the spring week application process.	Shows no understanding of the spring week application process.

## Finance Executive

### Screening Criteria

- Sound communication and organisational skills to work well in teams
- Strong passion towards both finance industry and the planning and execution of events
- Demonstrate good ideas and ability to think outside the box

### Candidate Scoring Criteria

1 (Best)	2	3	4	5 (Worst)
Enthusiastic, genuine passion for organising and executing finance events.  Demonstrates relevant experience and skills that back up a high level of commitment and interest to excel in the role	Interested and curious about the position with sufficient experiences to perform the tasks required	Some interest in organising events.  Hold some finance and organisational experiences.  Uncertain degree of commitment	Lack of confidence/ understanding of the benefits and considerations in organising an event.  Limited personal experiences.	Fundamental lack of interest and knowledge of the responsibilities of the position.  Lack of relevant experiences and poor aptitude to take on the role.

## Business Executive

### Screening Criteria

- Proven interest in management consultancy, entrepreneurship and other business careers
- Highly driven and committed individual fully capable of meeting deadlines
- Experience working in teams and communicating in a professional setting

### Candidate Scoring Criteria

	1 (Best)	2	3	4	5 (Worst)
Motivation	The individual shows a high level of enthusiasm and motivation.  High level of communication skills.	Shows good motivation and enthusiasm for the role.  Good communication skills.	Shows sufficient motivation and enthusiasm for the role.  Sufficient communication skills.	Shows little enthusiasm and motivation for the role.  Low communication skills.	Enthusiasm and motivation for the role are very poor..  No communication skills.
Capability	The candidate shows that they have an excellent understanding of organising events and driving to meet deadlines, and thrives in teams.	The candidate can organise events and has a good track record of achievement, as well as evidence of working well in teams.	The candidate shows signs of an ability to organise events and complete tasks on time, and can work with others.	The candidate shows little evidence of being able to work in teams and/or organise events, and may not work well with others.	The candidate shows no evidence of being able to work in teams and does not appear to be able to plan and organise events.

## Marketing Executive

### Screening Criteria

- Highly-driven and committed individual fully capable of meeting deadlines
- Experience working in teams and communicating in a professional setting
- Demonstrate good ideas and ability to think outside the box
- Ability to use content creating platforms such as Canva, Photoshop, iMovie

### Candidate Scoring Criteria

	1 (Best)	2	3	4	5 (Worst)
Motivation	The individual shows a high level of enthusiasm and motivation with genuine reasons to help others. High level of communication skills.	Shows good motivation and enthusiasm for the role. Good communication skills.	Shows sufficient motivation and enthusiasm for the role. Sufficient communication skills.	Shows little enthusiasm and motivation for the role. Low communication skills.	Enthusiasm and motivation for the role are very poor. No communication skills.
Capability	The individual shows that they have an excellent understanding of content creating platforms.	The individual shows that they have a good understanding of content creating platforms.	The individual shows that they have a sufficient understanding of content creating platforms.	The individual shows that they have some understanding of content creating platforms.	The individual shows that they have no understanding of content creating platforms.

## Economics Executive

### Screening Criteria

- Highly driven and committed individual fully capable of organising events and meeting deadlines
- Experience working in teams and communicating in a professional setting
- Proven interest in economics and related subjects

### Candidate Scoring Criteria

	1 (Best)	2	3	4	5 (Worst)
Motivation	<p>The individual shows a high level of enthusiasm and motivation with genuine reasons to help others.</p> <p>High level of communication skills.</p>	<p>Shows good motivation and enthusiasm for the role.</p> <p>Good communication skills.</p>	<p>Shows sufficient motivation and enthusiasm for the role.</p> <p>Sufficient communication skills.</p>	<p>Shows little enthusiasm and motivation for the role.</p> <p>Low communication skills.</p>	<p>Enthusiasm and motivation for the role are very poor.</p> <p>No communication skills.</p>
Knowledge	<p>The individual shows that they have an excellent understanding of organising events and thrives in teams.</p> <p>They do need to study an economic related course, but must be able to demonstrate an interest in the field.</p>	<p>The candidate can organise events and has a good record of handling them, working well in teams and a good understanding of economic news.</p>	<p>The candidate shows signs of an ability to organise events and can work well in teams.</p>	<p>The candidate shows little evidence of being able to work in teams, organise events and interest in economics.</p>	<p>The candidate shows no evidence of being able to plan events, work in teams and an interest in economics.</p>

## Social Executive

### Screening Criteria

- Proven interest in hosting social events for EFS members and Alumni
- Highly driven and committed individual fully capable in planning logistics and event running
- Motivated to create safe and inclusive environment for attending members
- Experience working in teams and communicating in a professional setting

### Candidate Scoring Criteria

	1 (Best)	2	3	4	5 (Worst)
Motivation	The individual shows a high level of enthusiasm and motivation.  High level of communication skills.	Shows good motivation and enthusiasm for the role.  Good communication skills.	Shows sufficient motivation and enthusiasm for the role.  Sufficient communication skills.	Shows little enthusiasm and motivation for the role.  Low communication skills.	Enthusiasm and motivation for the role are very poor.  No communication skills.
Capability	The candidate shows that they have an excellent understanding of organising events, accounting for logistics and thrives in teams.	The candidate can organise events and has a good record of handling events, as well as evidence of working well in teams.	The candidate shows signs of an ability to organise events and can work with others.	The candidate shows little evidence of being able to work in teams and/or organise events, and may not work well with others.	The candidate shows no evidence of being able to work in teams and does not appear to be able to plan and organise events.



## Client Relations Executive

### Screening Criteria

- Proven interest in the financial services industry (either through work placements, internships, or personal ventures)
- Proven record of being a great team player, who is constantly willing to go the extra mile for the team. Able to consistently meet deadlines.
- Shows clear passion in the role based on personal reasons – for example, wanting to use the opportunity to give back to the society / UCL.

### Candidate Scoring Criteria

1 (Best)	2	3	4	5 (Worst)
<p>Have prior experience working in firms (preferably in the Human Resource Division).            Good communication skills in emailing and pitching to potential sponsors.            Strong understanding of the financial services industry.            High level of personal commitment.</p>	<p>Prior experience working in firms.            Have done previous cold emailing to multiple firms.            Committed to work involved, willing to go above and beyond if necessary.</p>	<p>Minimal experience working in firms.            Questionable understanding of the financial services industry.            Limited commitment level, where the EFS might not be his/her highest priority.</p>	<p>No experience working in firms and/or sponsorship work.            Uncommitted individual who will not see things through.            Difficult team player.</p>	<p>No experience working in firms.            Clearly an uncommitted individual who does not have the best interests of the EFS at heart.</p>

## Technology Executive

### Screening Criteria for VP of Technology

- Demonstrates strong understanding of at least one Javascript coding language (Java etc) and one backend coding language (Java, Python etc)
- Has relevant experience in web design and running of web pages, preferably with portfolio in app and web apps
- Helpful, committed and creative individual

### Candidate Scoring Criteria

	1 (Best)	2	3	4	5 (Worst)
Motivation	The individual shows a high level of enthusiasm and motivation with genuine reasons to help others. High level of communication.	Shows good motivation and enthusiasm for the role.  Shows a good interest in an industry. Good communication.	Shows sufficient motivation and enthusiasm for the role. Shows a sufficient interest in an industry. Sufficient communication.	Shows little enthusiasm and motivation for the role. Shows minimal interest in any industry.  Low communication.	Enthusiasm and motivation for the role are very poor. Shows no interest in any industry.  No communication.
Knowledge	The individual shows that they have an excellent understanding of web design and technology implementation, with expertise in automation of basic tasks such as email sending. Has prior experience running a website or mobile app.	The individual shows that they have a good understanding of web design and technology implementation, with experience in automation of basic tasks such as email sending.	The individual shows that they have sufficient understanding of web design and technology implementation, with an understanding of automation of basic tasks such as email sending.	The individual shows that they have basic understanding of web design and technology implementation, with little to no knowledge of automation of basic tasks such as email sending.	The individual shows that they lack understanding of web design and technology implementation, with no knowledge of automation of basic tasks such as email sending.

## **Selection process for Mentorship Scheme**

### **Mentors**

Mentors will be selected by the VP of Mentorship and the Mentorship Executives. Selection of mentors will occur on an invite basis utilising the criteria listed below. The selection of 30-50 mentors on a typical year will occur mainly in Term 3.

### **Screening Criteria**

- Received at least one spring week offer
- Actively applied to spring weeks and shows knowledge of the spring week application process
- Being a previous mentee of the scheme is a plus but not a requirement
- Proven interest and enthusiasm in providing advice and support for mentees
- Highly driven and committed individual fully committed to attending mentorship sessions with mentees
- Motivated to maintain safe and inclusive communication with mentees

### **Mentees**

Mentees will be selected through an application process that will consist of two rounds:

- 1) A first round containing an application form which will ask for the applicant's CV, contact details and answers for a set of short questions formulated by the Current VP of Mentorship and mentorship executives.
- 2) A second round consisting of an interview. The set of interview questions will be agreed by the Current VP of Mentorship and mentorship executives prior to the recruitment process, and all candidates will be asked questions from the same question bank.

All candidates will be informed of whether they have been invited to an interview or not. Following interviews, all candidates will be informed whether they are to be offered the position or not.

The application process for mentees will open during August to October. It will look to select 60-80 mentees on a typical year. Additional applications could be done at a later date if the position is not filled.

Criteria listed are subject to future changes and will be disseminated to eligible members accordingly.

The CV, questions and interviews will be assessed and conducted by at least two people which will include any of the following:

- President
- Treasurer
- Vice President of Mentorship
- Current Mentorship Executives

The criteria that their CV, questions and interviews will be assessed on will be based on the following:

### **Screening Criteria**

- Proven interest in applying to spring week programmes in finance, banking and consulting
- Good relevant previous experience in the industry is a plus but not a requirement

- Attended a range of extracurricular and work experience programmes
- Ambitious, motivated and ready to learn individual
- Good leadership, communication and team working skill

### Candidate Scoring Criteria

1 (Best)	2	3	4	5 (Worst)
<p>The individual shows a high level of interest in at least one of the following industries – Finance, Consulting or Technology. Shows excellent motivation and commitment. The individual is very enthusiastic and supportive with excellent communication skills.</p>	<p>The individual shows a good interest in at least one of the following industries – Finance, Consulting or Technology. Shows good motivation and commitment. The individual is enthusiastic and supportive with good communication skills.</p>	<p>The individual shows a sufficient interest in at least one of the following industries – Finance, Consulting or Technology. Shows sufficient motivation and commitment. The individual is enthusiastic and has some communication skills.</p>	<p>The individual shows a little interest in at least one of the following industries – Finance, Consulting or Technology. Shows little motivation and commitment. The individual has some communication skills.</p>	<p>The individual shows no interest in at least one of the following industries – Finance, Consulting or Technology. Shows no motivation and commitment. The individual has no communication skills.</p>

If two or more candidates received the highest score then the VP of Mentorship, President and Mentorship Executives will have a final say on who to select as mentee.

# The Constitution and Bylaws of UCLU Bloomsbury Capital

## PREAMBLE

The UCLU Bloomsbury Capital Investment Club is a forum for UCL students interested in a career in investment management, private equity or investment banking to connect with each other, the investment community, and alumni. The Club offers students a unique opportunity to acquire real-world investment analysis and portfolio management skills through participation in a student-run, global equity portfolio.

## ARTICLE I: OFFICIAL NAME & AFFILIATION

1. Name
  - 1.1. The name of this organisation will now be known as Bloomsbury Capital (hereto referred as the “organisation”).
2. Purpose
  - 2.1. This organisation shall provide the opportunity to develop hands-on investment management experience with real money. This includes educating its membership on the core concepts of value investing.
  - 2.2. All funding received by this organisation, including initial and subsequent transfers from the EFS, as well as any monetary gains resulting from investments, shall be employed with the exclusive aim of facilitating a genuine experience in financial management and investment analysis to its analysts. This includes, but is not limited to, educational resources, workshops, conferences, guest speakers, and other investment simulation activities.
3. Governance
  - 3.1. This organisation shall be governed at all times by the provisions of the Constitution and Bylaws of Bloomsbury Capital (hereto referred as the “constitution”).
  - 3.2. The organisation shall be an officially chartered club registered under the University College London Union Economics and Finance Society (“UCLU EFS”).
  - 3.3. EFS Committee members may take up a position in the organisation, though the EFS President and Treasurer may only sit on the Advisory Committee.
  - 3.4. The Advisory Committee will consist of the EFS President and Chairperson in addition to all mentors, sponsors, and partners.
  - 3.5. The purpose of the Advisory Committee will be to provide professional assistance to the organisation in an advisory role.
  - 3.6. The Executive Board of Bloomsbury Capital shall be the primary governing body of the organisation. It retains sole control over all operational, financial, and executive decisions.
  - 3.7. The Executive Board is responsible for reporting to the Committee of EFS as required, without the latter exercising control over the board's decisions.

## ARTICLE II: MEMBERSHIP

1. General Membership
  - 1.1. General membership in the organisation shall be open to persons who are full-time and part-time fee-paying students, and who are members of the UCLU Economics and Finance Society.
  - 1.2. Approval of new members shall be observed by the Chairperson at any meeting.
  - 1.3. There shall not be any discrimination based on age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion/belief, sex, sexual orientation, in accordance with the UCLU Anti-Discrimination policies.
  - 1.4. A voting member shall be defined as any fee-paying student who has been offered and has accepted a position in the organisation. That student will then be referred to an analyst or associate within the organisation.
  - 1.5. An analyst may be promoted to the role of associate at the Chairperson’s discretion.
2. Membership Meetings

- 2.1. Meetings shall be held at least four times a month during the academic year, ideally on a weekly basis.
- 2.2. Special meetings may be held at the discretion of the Chairperson, as long as 2.1 is fulfilled.
- 2.3. Only voting members shall be allowed to vote on stock recommendations.

### ARTICLE III: OFFICERS AND EXECUTIVE BOARD

1. Officers
  - 1.1. This Executive Board will consist of 5 officers and a Chairperson: Investment Officer, Risk Officer, Ethics Officer, and Operations Officer.
  - 1.2. All officers, other than Ethics Officer, must be current, fee-paying, full-time or part-time UCL students.
  - 1.3. The Ethics Officer position will be held by a full-time Union representative, as agreed by the standing Executive Board and Union.
  - 1.4. All Officers are expected to attend every meeting to provide feedback and advice to all members.
  
2. Amendment to Officer Positions
  - 2.1. Officer positions may be changed or added with two-thirds majority vote of the then current Executive Board.
  - 2.2. Vacant officer positions are permitted.
  
3. Executive Board
  - 3.1. There shall be an Executive Board of this Organisation, which shall have all the powers and duties of this Organisation when the full membership is not in actual session.
  - 3.2. The Executive Board shall conduct the business of the Organisation and approve financial transactions in between normally scheduled board and general meetings.
  
4. Executive Board Membership
  - 4.1. Chairperson
    - 4.1.1. Set the vision and strategic direction of the organisation.
    - 4.1.2. Build on relationships with UCLU Economics & Finance Society, external sponsors/partners, and the professional community.
    - 4.1.3. Responsible for recruitment and appointment of all Associates and Analysts in the recruitment session at the start of each academic year ensuring adherence to 1.1.3. in Article II.
    - 4.1.4. Run and set meeting agendas and help prepare for meetings.
    - 4.1.5. Take responsibility for the Portfolio Management Team and act as Co-Portfolio Manager.
    - 4.1.6. Co-liaise with the Advisory Committee. Liaises with the EFS Client Relations division for sponsorship.
    - 4.1.7. Report to the Union quarterly on the performance and activities of the organisation.
  - 4.2. Investment Officer
    - 4.2.1. Acts as second in command. In the absence of the Chairperson, takes on all responsibilities of that role in the interim, until an EGM is called.
    - 4.2.2. Assume the interim duties and responsibilities of the Chairperson if he/she must resign from that position, until an EGM is called to resolve the matter.
    - 4.2.3. Assist in providing content for meetings, presentations, and discussions.
    - 4.2.4. Responsible for executing trades as approved by the Voting membership and Executive Board.
    - 4.2.5. Co-manages the Portfolio with the Chairman and Risk/Records Officer.
    - 4.2.6. Co-liaise with the Advisory Committee.
    - 4.2.7. Sets the Investment Mandate for the fund for the academic year of his/her tenure.
  - 4.3. Risk and Records Officer
    - 4.3.1. Assess the legitimacy of every trade made by the organisation from a risk standpoint.

- 4.3.2. Ensure that a Risk Assessment Checklist (RAC) is completed prior to the execution of each trade.
- 4.3.3. Responsible for maintaining full records of the organisation's activities, this includes the maintenance of a trade log, membership activity as well as all portfolio-related financials (Dividend, interest, capital gains and such).
- 4.3.4. Reports to the fund weekly on portfolio performance.
- 4.4. Ethics Officer
  - 4.4.1. Assess the legitimacy of every trade made by the organisation from an ethical standpoint, as per the UCLU ethics guidelines.
  - 4.4.2. Initiates discussion and revision of any position/activity the organisation takes that risks going against 4.6.1
  - 4.4.3. Ensures Bloomsbury Capital stays true to its Charter and Mandate.
- 4.5. Operating Officer
  - 4.5.1. Overseeing Daily Operations: The Operating Officer is responsible for the management and coordination of all day-to-day activities of Bloomsbury Capital. This includes the planning, directing, and overseeing of the club's operational policies, rules, initiatives, and goals.
  - 4.5.2. Strategy and Planning: The Operating Officer collaborates with other Executive Board members to develop and implement strategic plans and initiatives that align with the organisation's vision and goals. They may also participate in setting performance goals and targets for various functions within the club.
  - 4.5.3. Execution of Strategy: The Operating Officer is responsible for the successful execution of strategies decided by the Executive Board. They ensure that all parts of the organisation are working effectively towards these goals.
  - 4.5.4. Resource Allocation: The Operating Officer is responsible for overseeing and directing the allocation of resources within the organisation. They ensure resources are used efficiently and effectively to meet the club's objectives.
  - 4.5.5. Performance Monitoring: The Operating Officer must constantly review the performance of the club against its goals and plans. They ensure all activities are within budget and identify any areas where improvements can be made.

## 5. Voting Membership

### 5.1. The Executive Board

- 5.1.1. Role descriptions as in Point 4 of Article II.
- 5.1.2. Each vote is weighted 3 times.

### 5.2. Associates

- 5.2.1. Responsible for leading a team of analysts, for their development, attendance and experience within the fund
- 5.2.2. Expected to pitch at least twice throughout the year and provide guidance to their team in stock selection and pitch construction.
- 5.2.3. Attend all meetings possible, informing the Risk & Records Officer of any problems here.
- 5.2.4. If given notice by the Executive Board, associates must produce and present a pitch within 7 days otherwise Article VI, Sections 1 and 2 may apply.
- 5.2.5. Each vote is weighted 2 times.

### 5.3. Analysts

- 5.3.1. Assist their associate in the conception of investment ideas, and bringing these through to fruition in a pitch.
- 5.3.2. Utilise educational resources and research as provided by relevant officers to develop skills as an investor, share these ideas and engage in market discussion at meetings.
- 5.3.3. Research and monitor sector and industry trends.
- 5.3.4. Pitch at least 2 companies per year, provided circumstances allow.
- 5.3.5. Attend all meetings possible, informing the Risk & Records Officer of any problems here.

5.3.6. Each analyst voted is weighted 1 time.

#### ARTICLE IV: FINANCIAL POLICY

##### 1. Continuation

- 1.1 All funds transferred from the EFS and any gains on those funds will remain invested by the fund for the life of the organisation.
- 1.2 If the organisation is no longer able to operate, all funds will be returned to the EFS.
- 1.3 Any amendments to Article IV, Section 1. Continuation (including 1.1 to 1.3), must require a unanimous vote by all previous chairmen and chairwomen of Bloomsbury Capital, which so far includes: Alex Hughes (2014/15), Edward Mclaughlin (2015/16), Devraj Singh (2016/17), Corneliu Civid (2017/18), James Kelly (2018/2019), Stefanos Roxanis (2019/2020), Matteo Loria (2020/21), David Yang (2021/2022), and Anthony Dinh (2023/2024)

##### 2. Bank Account

- 2.1. The Organisation shall maintain a brokerage account under the organisation and Union's name.
- 2.2. The Chairperson, Investment Officer, and Risk Officer shall be appointed as the three signatories.
- 2.3. All income will be paid directly into the organisation's brokerage account.
- 2.4. The account must be set up without overdraft facilities.

##### 3. Brokerage Account

- 3.1. The organisation shall hold a brokerage account in the organisation's name at a reputable broker.
- 3.2. The Chairperson, Investment Officer and Risk/Records Officer shall be appointed as the brokerage account traders.
- 3.3. Only the 3 named traders are authorised to buy and sell investments on behalf of the organisation and must all approve any transaction independently.
- 3.4. All cheques due to the organisation's account are to be made out to the organisation's name on non-transferable cheques.

##### 4. Funding

- 4.1 The Chairperson must work to ensure the organisation is adequately funded by coordinating with the EFS President & Treasurer.
- 4.2 Funds will be provided to the organisation as either 'investment funds' or 'discretionary funds'.
- 4.3. For all types of funds, Article IV, Section 1 will apply.
- 4.4. Investment funds must necessarily be used only to invest in approved stocks.
- 4.4.1 Approved stocks are any stocks which have been voted 75% or more in favour by the fund members, as according to vote multipliers outlined in Article III, Section 5.
- 4.5. Discretionary funds may be spent as seen fit by the Executive Board for the benefit of the fund.
- 4.6. The Chairperson may veto any discretionary spending suggestions.
- 4.7. Investment funds are completely immutable and must always remain as investment funds.
- 4.8. Any remaining discretionary funds by the year end will be automatically converted to investment funds to be used in the next year, if allowed by the EFS.

#### ARTICLE V: ANNUAL GENERAL MEETING

##### 1. Performance Review

- 1.1. The Risk/Records Officer shall produce a statement of accounts at the AGM.



- 1.2. The report shall detail the performance of the fund with data including net %, number of trades and portfolio composition.
- 1.3. A majority vote of the membership is required to elect a member in good standing as indicated in Article II) to an officer position.
2. Elections
  - 2.1. The Chairperson shall call for an election at the end of each academic year, in lieu with the Annual General Meeting.
  - 2.2. All Executive Board member positions will only be held by candidates who have been elected by a majority vote.
  - 2.3. All Officer candidates must declare their candidacy at least one week before the Annual General Meeting.
  - 2.4. Majority vote must be cast by existing members to elect a candidate in good standing (as indicated in Article II) to an Executive Board member position.
  - 2.5. No weighting of votes will occur in these elections.
  - 2.6. Members of the Executive Board may nominate themselves for re-election, after which they will have equal standing and rights as any other nominee.
  - 2.7. Only members of Bloomsbury Capital have the right to vote in these elections
3. Appointment of Portfolio Managers
  - 3.1. Portfolio Managers
    - 3.1.1 The Chairperson, Risk/Records Officer, and Investment Officer shall be the Portfolio Managers of the organisation.

#### ARTICLE VI: TERMINATION OF MEMBERSHIP

1. General
  - 1.1. Termination of any student's membership must occur only as a result of a majority vote by the Executive Board.
  - 1.2. Termination of any student's membership must be explained to the remaining fund members if requested by said fund members.
  - 1.3. Termination can not infringe on guidelines outlined in Article 2, Section 1, Subsection 1.3.
2. Performance
  - 2.1. All fund members must attend the first 3 meetings before any requests of absence may be made.
    - 2.2. The membership of any fund member may be up for review (as indicated in Article 6 Section 1), if they do not attend at least 70% of the meetings or are more than 20 minutes late to 4 consecutive meetings.
    - 2.3. Any associate refusing to pitch at least 2 times in the year will have their membership reviewed.
    - 2.4. Any analyst refusing to participate in their associate's pitches will have their membership reviewed.
3. Legacy Membership
  - 3.1. Following the AGM, the new Chairman may select a number of 'legacy members'.
  - 3.2. Legacy members are entitled to only attend and watch stock pitches
  - 3.3. Legacy members may not vote on any stock pitch or during the AGM elections.
  - 3.4. Legacy members' membership may be subject to review at any time, but Article VI Section 1 must apply as with all memberships.

#### ARTICLE VII: AMENDMENTS

1. Constitution

1.1. This Constitution (with the exception of Article IV, Section 1. Continuation 1.1 - 1.3) may be amended by supermajority vote of 2/3rds or more by the Executive Board.

President name:	Haoyu Wang
President signature:	<i>Haoyu Wang</i>
Date:	30/05/2023
Treasurer name:	Sunny Qian
Treasurer signature:	<i>Sunny Qian</i>
Date:	30/05/2023