**BACLS Guidance Sheet**

**How to write a conference budget**

*The advice here is particularly aimed at those who might be applying for conference funds or to our BACLS-endorsed events bursaries, which require a budget breakdown. It is not tailored to helping with the financial sections of funding applications to research councils and other research funders.*

* Get friendly with Excel. It will do your maths for you. Info from there can be cut and pasted into other docs if need be.
* Your **projected income** and your **planned expenditure** should aim to balance out.
* **Income** is usually generated from:
  + conference fees
  + accommodation costs, if booked through the university
  + publisher tables or association stands (usually only for very big conferences)
  + Optional extra ‘Conference Dinner’ (if not included in the fee). *Always factor a tip into the price of this to avoid a nightmare at the restaurant.*
  + Any faculty/university conference funding.
* **Expenditure** is usually on:
  + teas and coffees
  + lunches, if included
  + keynote speaker travel and accommodation (and potentially speaker fees, although BACLS does not offer fees to its WHN keynotes)
  + keynote speaker dinners and lunches
  + printing costs (posters, programme)
  + badges/registration material
  + room hire (some campuses don’t charge for this; for others it can be extremely expensive)
  + wine reception, if included
  + glass hire for wine, if having a wine reception
  + dinners, if included
  + extra costs such as performances/readings.

**Conference fees – considerations**

* Most conferences offer graduated fees, with full-time faculty paying the full rate and PGRs paying the least. Often there’s a ‘middle rate’ for hourly-paid lecturers or those on fractional contracts. BACLS supports graduated fees as a fairer way of making conferences as accessible as possible.
* In your projected income you have to work with any graduations, so ask yourself: is this primarily a postgrad conference? Is this free to staff and students at my institution? What’s the likely mix of PGRs to full-time faculty who might attend? How can we ensure we get more full-time staff, if we are worried about covering costs?
* Bear in mind that universities that do pay for their staff and students to go to conferences (and not all do, in these straightened times) usually only do so if their representatives are presenting a paper. In other words, a conference with only 6 main speakers will not generate as many fees as a conference where 25 people are giving papers, simply because fewer people will have institutional support to attend.
* If you are trying to keep costs down, consider: letting people buy their own lunches in a nearby café; buying your own biscuits/crisps/wine from a supermarket rather than ordering through university catering; having electronic publicity and programmes; inviting keynotes who live locally.
* Request quotes for expenses such as catering to ensure your planned expenditure is realistic. Teas and coffees are surprisingly expensive!
* Check that any quotes include VAT and if in doubt, ask. An additional 20% here and there can make a big dent in the budget.

**SAMPLE 1-DAY CONFERENCE BUDGET**

*Based on projected attendance of 25*

|  |  |
| --- | --- |
| **Projected Income** |  |
| FTE fees @£30 per person x 7 | 210 |
| HPLs/fractional fees @£20 x 3 | 60 |
| PGR fees @£10 per person x 15 | 150 |
| Faculty contribution @£100 | 100 |
| **Total** | **£520** |

|  |  |
| --- | --- |
| **Expenditure** |  |
| Keynote speaker  travel @ £100  accommodation @£75  conference dinner @£40  taxi to and from campus @£8 per trip | £231 |
| Lunch @ £6 per person x 28 (projected attendees, plus speaker & organiser and helper) | £168 |
| Teas and coffees x 2 @£1.20 per person x 28 | £67.20 |
| Room hire | Free |
| Wine reception @£1.50 per person x 28 | £42 |
| Printing and badges | £15 |
| **Total** | **£523.20** |

**Shortfall: £3.20 (negligible)**

Compiled by Jennifer Cooke and Huw Marsh, July 2019.