



YET WEBGUIDE - THE EXPEDITION BUDGET

Tony Land– Revised 2019

A. THE EXPEDITION PLAN

Before any serious planning of the finances can begin some basic decisions must be made. Some of these are discussed further later on.

- Clearly identify and agree the aims and objectives of the expedition.
- Size of the party (Leader Team / Members)
- What fees will be paid? – by leaders - by members. Everyone should know this before agreeing to join.
- What extra charges will members face? E.g. training costs, jabs, travel to port/airport? They **must** be told well in advance and before formally joining.
- Target dates - these may be modified (perhaps to save money on flights)
- Target Location - again these may be modified later
- Methods of transport
- Purchase of food locally?
- Advance Party/recce needed? and possibly a Rear [clear-up] Party afterwards?
- Will you have a Support Team?
- A Patron?

B. CREATING THE EXPENDITURE BUDGET

1. From the early stages it is useful to have two columns: the optimistic and the pessimistic ones. The former [**Plan A**] allows for the initial ambitions of the plan, the second is **Plan B** - more of a minimal amount for a revised plan if it has to be 'cut according to its cloth' at a later stage.
2. Detailed information can then be sought: this can take a lot of time and effort much of which may be delegated.
3. Cut-off points should be decided in advance. These are the points at which the Treasurer may have to advise the designated overall Venture Leader that there will not be enough funds for Plan A and changes must be made. *[Note that the Leader may want to carry on in the hope that 'something may turn up'.]*
So what can be done? Options might include:
 - i. change the venue to one with fewer costs
 - ii. change dates to avoid expensive dates for travel
 - iii. change travel routes *[see below]*
 - iv. reduce ambitions

Suggested budget items follow:

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C. TRAVEL COSTS

1. Main fares (air, road, sea, rail etc.). In most cases these are affected by routes taken and the dates of travel. It may be cheaper to travel to a different airport (even in a different country) and then proceed by road.
2. Accommodation *en route*
3. Food *en route*
4. Local transport – and/or fuel
5. Transport to port/airport in the UK *Will all this be part of the expedition fee or an extra charge on the members? If so this should be made clear at the outset.*
6. Insurance (e.g. for hired vehicles)
7. Transport, including documentation charges, of equipment.

D. EXTRA GROUPS

1. Reconnaissance expedition: usually necessary in most cases.....but can an In-Country Agent do this?
2. Advance party and/or Rear party
but all these can be expensive and a tight budget needs to be set and controlled.

E. FREIGHT

1. Main costs – on aircraft, ships etc. Some big airlines can be generous with regard to expeditions of young people. You may even consider container transport for freight.
2. Local costs – trucks, mules, camels etc.
3. Insurance [see Separate WebGuide Chapter on Insurance]
4. Costs in UK to send kit to the port or airport
5. Warehouse charges at the port
6. Customs duties and VAT

You may be able to avoid freight charges by buying or borrowing items when you get there.

Consider also what needs to be brought back: for instance it is probably daft to bring back empty water cans (bulky) and tent pegs (heavy) when it is cheaper to replace them than pay freight charges.

F. FOOD

1. Taken from the U.K.: weight and bulk the main problems. Some may be split between members.
2. Import regulations and customs duties – usually not a problem, but check.
3. Local supplies: reconnaissance party can check availability. *Need to weigh the benefits to the local economy (and developing the initiatives of the members) against possible problems for local people if a big expedition buys up all the local supplies.*
4. Special food storage needs in the field.
5. Last night party? Birthdays?
6. Food on the outward journey.
7. Food on the return journey.

G. EQUIPMENT

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1. Tents
2. Cooking equipment and fuel (Some airlines are fussy about stoves. e.g.. no gas, and such as MSR stoves and fuel bottles need to be washed out and odour-free).
3. Medical and first aid [*some groups donate remains to local clinics/hospitals at the end of an expedition: but ensure that they are handed over to the appropriate staff and in the presence of others to avoid them being sold on the Black Market*]. An official letter from a medical practitioner confirming contents & use of the first aid kits may be necessary.
4. Boats, climbing gear etc. etc.
5. Survey & Scientific
6. Technical Safety Gear? Satellite Phones? PLBs? Spot?
7. Books, maps and stationery
8. Photography
9. Boxes, wire and other packaging
10. Expendable Stores (e.g. toilet paper, washing-up materials)

It may be possible to buy some items (expendable stores) or borrow (camping and cooking gear) on arrival to avoid freight costs.

H. ADMINISTRATION

1. Postage and telephone – including foreign letters and calls
2. Printing/duplicating
3. Travel
4. Secretarial
5. PR expenses
6. Receptions for sponsors and parents – before and after the expedition.
7. THE EXPEDITION REPORT

Some of these expenses might be carried by a sponsoring organisation (e.g. School, College ...).

I. TRAINING

1. Accommodation
2. Food
3. Travel
4. Literature (handouts etc.)
5. Equipment hire
6. Insurance, both medical and travel.

Will all or any of this be an extra charge on the members? If so this should be made clear at the outset.

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J. INSURANCES

See separate chapter in the WebGuide

TRAVEL INSURANCE SHOULD BE TAKEN OUT **BEFORE FLIGHTS ARE BOOKED!!**

J. EXTRAS

1. Inflation in the UK
2. Inflation abroad
3. Contingencies (10 – 15%) ***A very necessary part of the budget – but with an agreement of what they are to be used for or repaid if not needed.***

K. COST REDUCTION

1. Parent organisations. What can they cover? *If this includes insurance see the warnings in the **Insurance** chapter of this WebGuide.*
2. Estimates – get three or more - and shop around for best deals on credit cards, air fares etc.
3. Alternatives – Plan B *See Section B (above)*
4. Freight charges *See Sections E and G (above)*
5. Customs duties – e.g. to get permission to import/export scientific kit and vehicles
6. Cheaper travel alternatives (see separate sheet ‘Travel Bookings’)

L. INCOME

A Support Team (parents, friends, colleagues) can be invaluable here.

1. Fees (when are they to be paid?) *A planned series of payments (e.g. monthly) may be possible but it needs to be related to major expenses such as air fares. **SHOULD BE PART OF A TIMELINE***
2. Fund raising (how is this income to be allocated?) *It is important to have clear and written guidelines on this if disputes are to be avoided. If individual members raise money do they keep it all? Does it all go to the Expedition? Or is there an agreed split? How is Gift Aid to be treated (centrally or personal?)*
Appoint a central co-ordinator. Potential benefactors can be put off by several requests from the same organisation
3. What to ask for (goods as well as money). *Firms are often more likely to give goods than cash.*
4. Contacts – *at an early stage trawl the members and others friends and contacts. E.g. who does John’s father play golf with!*
5. Think local – *local firms and newspapers are more likely to show interest than will big national ones.*
6. Grants from Trusts and other bodies – *plenty of research to be done here and a strong case for delegation – but don’t be too optimistic! Don’t forget local authorities who still have grants for young people despite budget cutbacks.*

See also the **FUNDRAISING** Chapter in this WebGuide.

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M. BUDGET HEADINGS

BUDGET EXPENSES

Travel	£
Recce, advance & rear parties	£
Freight	£
Food	£
Equipment	£
Administration	£
Training	£
Insurance	£
Other Expenses	£
Contingencies	£
Inflation	£

= **TOTAL PLANNED EXPENSES** £ _____

BUDGET INCOME

INDIVIDUAL CONTRIBUTIONS

n Leaders @ £	£
n Leaders @ £	£
n Members @ £	£
n Members @ £	£

= Total contributions	£
+ Central Fundraising Target	£
+ Grants & Donations Target	£
+ Gift Aid Target	£
+ other income promised	£

= Income to date	£
+ Remaining requirement	£

= **TOTAL PLANNED INCOME** £ _____

N. SURPLUS OR DEFICIT?

It is unlikely that you will precisely hit your targets so to avoid later disputes, policy on how to handle this matter should be decided and made clear to all stakeholders in advance.

WHAT HAPPENS IF YOU OVER-SPEND?

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Who makes up the difference?

1. You, the Venture Leader?
2. Your organisation (if any)?
3. All the leaders?
4. All the members?

WHAT HAPPENS IF YOU UNDER-SPEND?

Who keeps the surplus?

1. The Venture Leader keeps it
2. It is shared between all the leaders
3. It is shared between leaders and members
4. Your organisation gets it
5. You return some of the grants (refer to the terms of the grant, which can be specific in this area)
6. It is kept to help fund the next expedition.