



**A GUIDE TO ORGANISING A
BALINT SOCIETY EVENT**

Organising an event with The Balint Society.

Thank you for volunteering to co-ordinate an event with The Balint Society. The most important things to agree with the society are ***the date, the venue and the budget***. Registration should start at least three months before an event. Please contact the administrator – administrator@balint.co.uk in the first instance, who will liaise with The Balint Society Council. You will be appointed a Society Representative to work alongside.

The key stages of organising a Balint event are as follows:

DATE

Please email the Balint Society Administrator – administrator@balint.co.uk with your proposed dates. The Balint Society organises a whole range of events each year and is mindful of International Balint events as well www.balintinternational.com.

To Do: Confirm the date via the Administrator & your nominated council member.

VENUE

You may be able to find a free venue through your Trust, Department of Psychotherapy, local university or college. If you are hiring a venue, study the terms and conditions carefully including the cancellation policy. If it is an educational institution, we may be able to claim back VAT see [Appendix 8](#).

To Do: Send details of the costs, terms and conditions to the Treasurer.

BUDGET

- Work out a draft budget with reference to the schedule of fees see [Appendix 2](#). You should adopt the standard fees and reimbursements as set out there. [Appendix 3](#) 'What to include in your budget' reminds you of all the things to consider.
- Decide the leaders well in advance if possible. Try to pair Psychotherapist/GP, male/female, accredited/on the accreditation pathway. Leadership development groups need to be led by at least one accredited leader with experience of leadership development.
- The Treasurer needs to know ***before the event*** what your accredited leaders and speakers are going to claim. If any of them are coming from abroad discuss travel costs with the Treasurer. Weekends usually aim to break even. Study days and leadership training days usually involve a subsidy from the Society

To Do: Send details of your budget to the Treasurer and council member at least 5 months before the event.

Once council has agreed to hold and underwrite the event, confirm with the venue and ask the Treasurer to pay the deposit.

EVENT TEMPLATE

Complete the Event Template Appendix 1 and send it to the Administrator. This should include a description of the event to go on the front page of the website and draft timetable which can be changed nearer the time if necessary.

If you would like to discuss the shape of your event, choice of leaders, speakers or anything else please contact the council member and/or the leadership team.

To Do: Send the event template to the Administrator to put the event on the website – administrator@balint.co.uk.

REGISTRATION

Registration should open at least 3 months before the event. Registrations will automatically be notified to you and the Administrator by email. They can be sent to others in your team as well. The Administrator will produce a summary sheet of registrations to date, on request. Keep an eye on numbers and decide when registrations should close. The Administrator will notify you of any cancellations.

To Do: Open registration at least 3 months before the event. Keep an eye on registrations

FINAL PREPARATIONS

- Notify the venue of final numbers for catering, chairs etc.
- Draw up group lists and send to leaders to check there are no boundary issues.
- A week before send a welcoming email to participants, through the Administrator, reminding them of the venue and timetable. Consider including group lists.
- Make a time for the leaders to meet together before the event starts. Agree times to meet during and after the event as well.

To Do: Notify venue of final numbers. Draw up the groups and get together with leaders and speakers. Liaise with Administrator to send email to participants with event details.

ON THE DAY

- Have a signing in list. Forward this to the Administrator after the event making a note of anyone who didn't come, and any unexpected extras people.

- Sticky labels and pens for names.
- Feedback forms if you wish.
- Copies of past Balint journals if available for non-members
- Recording talks. If you choose to record a talk a podcast can be posted on our website – you will need to be mindful of confidentiality re patients or group members. Discuss with the member on council if in any doubt.
- Encourage people to join the Society and signpost them to future events.

To Do: Ensure there is a signing in list. Provide appropriate stationery, journals, feedback forms etc.

AFTER THE EVENT

- Send invoices to the Treasurer.
- Certificates - forward participant list and number of hours PPD to the Administrator who will send out confirmation of attendance.
- Fees and expenses - advise leaders and speakers claiming fees and expenses to do so within two months max. They should submit an invoice for their fee, a travel claim form [Appendix 4](#), and if a trustee a letter of remuneration [Appendix 5](#) to the Treasurer.
- The Treasurer and Administrator will draw up a short summary of income and expenditure for the event and will run this past you before it goes to council for information.
- Prepare a brief report for council and a summary of any feedback.
- Journal and website. Is there anything to publish in the journal or on our website

To Do: Deal with certificates, fees and expenses and a brief report.

CANCELLATION

Our cancellation policy is stated on the website see [Appendix 7](#). To date we have never had to cancel an event. If you are worried about numbers please discuss with the member on council, send out another reminder through the administrator, prolong your closing date for registration and bear in mind people often sign up quite late. It may be best to go with whoever has signed up to come, rather than risk the disappointment of cancelling. Participants will have already made arrangements for travel and accommodation and it is unlikely they will have insurance for this.

Good luck with it all. We hope you enjoy the event and would love to hear all about it.

List of Appendices

- Appendix 1** – [Event Template](#)
- Appendix 2** – [Schedule of fees April 2019](#)
- Appendix 3** – [What to include in your budget](#)
- Appendix 4** [Travel claim form](#)
- Appendix 5** [Fees declaration form for trustees](#)
- Appendix 6** [Personal invoices – required information](#)
- Appendix 7** [Cancellation policy](#)
- Appendix 8** [Claiming back VAT from educational institutions](#)

Contact Information

- Treasurer** Dr Ann Evans evansann@live.co.uk
- Administrator** Julie Saxton administrator@balint.co.uk
- Leadership Team** leadership@balint.co.uk

EVENT REGISTRATION – APPENDIX 1

This form should be completed by the event organiser, as soon as possible but no later than three months before the event, and sent to the Administrator – administrator@balint.co.uk.

If you have any queries, please contact the Administrator.

Event Co-Ordinator Name & Title	
Event Co-Ordinator Contact Details	Email: Phone:
Event Type (please tick)	<input type="checkbox"/> Leadership Training <input type="checkbox"/> Two Day Event <input type="checkbox"/> Weekend <input type="checkbox"/> Lecture <input type="checkbox"/> Other (Please give details):
Event Date & Time	Start Date & Time: End Date & Time:
Event Venue Name, Address & Contact Details	Post Code:
	Telephone:
	Email:
	Website:
Event Title	
Event Summary A short summary for the front page of the website including what groups will be available.	
Description of Event This will be on the registration page.	

<p>Event Timetable A draft timetable will be posted on the registration page.</p>	
<p>Certificates and PPD State how many hours work / Personal and Professional Development for certificate, do not include breaks.</p>	
<p>Choice of groups Please detail what groups are available.</p>	
<p>Leadership experience Participants will routinely be asked 'do you have previous leadership experience Yes / No. If you want free text please say so here.</p>	
<p>Mobility & Sensory Requirements? Dietary Requirements?</p>	
<p>Delegate Fees See Schedule of fees Appendix 2. Student fees if appropriate, and the opportunity to apply for a bursary should be advertised at all events.</p>	
<p>Cancellation Policy This is routinely stated on the registration page</p>	
<p>Maximum number of participants, if limited.</p>	
<p>Maximum number of students, if limited.</p>	
<p>Registration start date.</p>	
<p>Registration end date.</p>	
<p>Additional organisers to receive copies of registrations and reports of registrations (if wanted). Name and email.</p>	

BALINT SOCIETY EVENTS SCHEDULE OF FEES – APPENDIX 2

Registration Fees

Registration Fees (if an accredited leader see notes)	Fee (£)
Leadership and study days non- residential	£80
Leadership and study days online	£60
Leadership and study days online half day	£30
Leadership and study days non-residential or online – student	£10
Weekends residential recommended	£300 (£350 max).
Weekends non-residential	£160
Weekends non-residential inc evening meal	£200 max
Weekends student residential	£50
Weekend student non-residential	£20
Two Day Event non-residential	£160
Two Day Event non-residential inc evening meal	£200 max
Two Day Event non-residential student	£20

Note: Accredited leaders who are leading groups, do not have to pay a registration fee at any weekend or weekday event. The Administrator will give them a registration code.

Accredited Leader Fees and Travel Expenses

Accredited Leaders Fees	Fee (£)
One- or two-day Leadership and study days non-residential fee	<u>Up to</u> £350 per day

Accredited leaders Travel expenses reasonable return costs from home to venue within the UK. *Agree travel costs with Treasurer beforehand if outside UK*

Accredited leaders should submit their own invoice, society travel claim form, and if a trustee, a disclaimer form to the Treasurer and event organiser within 1 month (max 2 months) of the event.

Weekends – Accredited Leaders Registration Reimbursement only

Accredited Leaders are reimbursed the non-residential registration fee (£160 – £200). If they are residential, they pay the difference between this and the residential fee. The Administrator will supply a code.

Travel costs and fees will not be paid at weekend events except in exceptional circumstances and with prior consultation with the treasurer.

Bursaries for events

Bursaries up to £50 per day are available for all events to those whose gross income is less than £18,000 pa. This should be advertised with the event. Application should be made to the Treasurer in advance of the event.

Speakers

Speakers should be offered a fee and travel costs to be agreed with the treasurer in advance. The Biennial Memorial Lecture fee is £250

Travel on behalf of The Balint Society

Travel and overnight accommodation costs when on Balint Society business or representing the Society may be reimbursed by prior agreement with the treasurer.

Supervision

Recommended fee for supervision £60 - £90 per hour

Other

Request for reimbursement of any other costs incurred in doing work for the Balint society should be discussed with the treasurer in advance.

BUDGET PLANNING – APPENDIX 3

Costs

1. Venue costs inc VAT (you may be able to reclaim VAT if it's an educational institution)
2. Catering teas, coffees, lunches, dinner
3. Transport – if you are booking a coach for delegates
4. Accredited leaders' fees*
5. Accredited leaders' expenses*
6. Speakers fees and travel expenses
7. Event organisers expenses incurred in setting up the event. Note event organisers are not entitled to a free registration or a fee, unless they are an accredited leader leading a group at the event.

**if you don't know who your leaders will be when first submitting a budget assume, they will each claim £350 in fees and £60 in travel expenses.*

Income

1. Delegates registration fees. *Remember the accredited leaders leading groups don't pay a registration fee at any event.*

Uncertainties

We appreciate that you may not know:

- Exactly how many people will be coming and may not know how many groups and leaders you will need until nearer the time.
- Exactly how much the leader's fees and travel expenses will be.

However, once council has agreed on the event, we agree to underwrite it. We expect to subsidise events to varying degrees. Study days and two-day events often require some subsidy and it can be harder to gauge how many are coming, how many leaders will be required. Weekends aim roughly to break even and are usually easier to budget for.

THE BALINT SOCIETY – TRAVEL CLAIM FORM – APPENDIX 4

Please complete and send with receipts to the Treasurer within one month of the event:

Dr Ann Evans evansann@live.co.uk
Spindlewood
Fron Bache
Llangollen LL20 7BW

When approved expenses will be paid into your bank account directly and you will be informed by email.

Name:	
Email:	
Date of event:	
Description of event:	
Journey between - and -	
Mileage (paid @ 40p per mile)	
2nd class rail fare	
Taxi / bus / plane	
Bank sort code	
Bank account number	
Name on bank account	

Approved and paid on (date)

Signed / initialled

LETTER OF REMUNERATION – APPENDIX 5

Payments to trustees and connected persons

Balint Society Trustees and connected persons* need to fill in their personal details and sign this standard letter from the Society when they submit an invoice.

Instructions for Trustees

1. The attached letter of remuneration should be completed by you for each event where you are being paid to provide a service, or where a person connected to you is being paid - see definition of connected person below.
2. Insert information where marked in red.
3. Sign the letter, electronic signature or initials.
4. Send with your invoice for payment to

Dr Ann Evans Treasurer evansann@live.co.uk
Spindlewood
Fron Bache
Llangollen LL20 7BW

Balint Society Letter of Remuneration

From The Balint Society, a charity registered in England and Wales with registered charity no. 261387

To Your name

Invoice Date

Dear Colleague,

The Balint Society – Payment for the Provision of Services

1. Subject to the terms of this letter, the Service Provider will provide training for Society members and non-members in relation to Balint methods and practices, to promote the objects of the Society (the “**Services**”) [on [Date]]/[from [Date] to [Date]] at [Location]¹
2. In exchange for the provision of the Services, the Society will pay to the Service Provider an amount of £[Amount] (the “**Service Payment**”).
3. When determining the amount of the Service Payment, and whether to pay the Service Payment to the Service Provider, the trustees of the Society (together, the “**Trustees**”) have, in compliance with their duties, agreed that:
 - (a) the Service Provider, or, where the Service Provider is a connected person, the trustee with whom the Service Provider is a connected person (the “**Connected Trustee**”), will withdraw from any discussion of the Trustees which has any bearing on the terms of this letter, the Services or the acceptability of the standard of the Services. Notwithstanding this paragraph, the Service Provider or Connected Trustee (as applicable) is not prevented from providing information which the Trustees may need in order to make a decision on the matters detailed in this paragraph; and
 - (b) the Service Provider or Connected Trustee (as applicable) shall not:
 - (i) vote on any of the matters detailed in paragraph 3 above; or (ii) be included when determining whether a quorum exists at a meeting to discuss any of the matters detailed in paragraph 3 above.
4. [The Service Provider is a “connected person” in respect of a Trustee as defined in section. 188 of the Charities Act 2011.] [Delete if you are a trustee²].

¹ [Description of services to be supplemented as necessary so that it is accurate and precise.]

² [A “connected person” means family, relatives or business partners of a trustee; it also covers businesses in which a trustee has an interest through ownership or influence. This includes the trustee’s spouse or unmarried or civil partner, children, siblings, grandchildren and grandparents (and their respective spouses or civil partners), as well as businesses where a trustee or family member holds at least one-fifth of the shareholding or voting rights.]

5. This letter (and any dispute, controversy, proceedings or claim of whatever nature arising out of or in any way relating to this letter) is governed by and shall be construed in accordance with English law.
6. Please sign and return a copy of this letter to us to confirm your agreement with its terms.

Yours faithfully

Dr Sylvia Chudley, Hon. Secretary, authorised signatory on behalf of the Society as authorised by the Trustees on behalf of the Society.

.....

I acknowledge and confirm my agreement to the terms of this letter:

Name: _____

Date: _____

THE BALINT SOCIETY – PERSONAL INVOICE -APPENDIX 6

Please provide the following information to the treasurer, when you are submitting a personal invoice:

- **From: Name**
- **Address**
- **Postcode**
- **Date of invoice**
- **Date of event**
- **Name of event**
- **Your role at event**
- **Your Fee for services provided at the event**
- **Name on Bank Account**
- **Bank and sort code**
- **Bank account number**

Please send your invoice, with the letter of remuneration if you are a trustee to

Dr Ann Evans Treasurer evansann@live.co.uk
Spindlewood
Fron Bache
Llangollen LL20 7BW

THE BALINT SOCIETY – CANCELLATION POLICY – APPENDIX 7

Cancellation by a delegate

1. Cancellation requests should be submitted in writing to the Administrator with the bank account name, sort code and account number used to pay the registration fee.
2. The Society will refund the registration fee paid at day delegate rate, less an administration charge of £25.00.
3. Refund of payments for overnight accommodation and the annual dinner will be subject to the Society being able to change the number of delegates contracted with the provider, or there being a refund by the provider. Late cancellations may therefore receive only a proportion or none of this payment.
4. In the case of payment by Trusts, an alternative delegate may be sent to the event free of charge. Please notify the administrator of their details.
5. When a delegate does not attend without notice, no refund can be issued.

Cancellation by the Society

1. In the unlikely event of The Balint Society cancelling an event, the registration fee will be refunded in full.
2. Occasionally it is necessary to make late changes to an event programme and the Society reserves the right to do this.

THE BALINT SOCIETY –VAT EXEMPTION FORM- APPENDIX 8



Education Conferences and Events VAT Exemption Form

To (Venue): _____

**In connection with
(Title of Event):** _____

**Name of organisation ('eligible
body') that wishes to claim
exemption:** _____

Date(s) of Event: _____

I/We wish to claim exemption from Value Added Tax for the supply of conference facilities and/or goods and services closely related to education by yourselves in connection with the conference/course detailed above being arranged by The Balint Society.

We confirm that the organisation is an "eligible body" as described in the HMRC document Guidance: Education and Vocational Training (VAT Notice 701/30: Section 4.1 <https://www.gov.uk/guidance/vat-on-education-and-vocational-training-notice-70130>).

The Balint Society is a non-profit making Charity (Reg Charity No. 261387) with an educational purpose and fulfils the conditions for being 'An eligible body'.

We understand that supplies of alcoholic or soft drinks, special or superior catering and any other specially charged personal services are not exempted from Value Added Tax.

Signed on behalf of the Organisation

Date

(Name and position)

If you require further clarification please contact the Balint Administrator by email at administrator@balint.co.uk.

VAT Exemption Guidance Notes

For VAT purposes, when a (university/college/LA/other as detailed below) provides conference facilities to The Balint Society, it is doing so as one eligible body, to another with an educational purpose, so does not need to charge VAT.

Guidance: Education and vocational training (VAT Notice701/30): Section 8.6.

1. The Balint Society is 'An eligible body'.

The Balint Society is a Charity (Reg Charity No. 261387) with an educational purpose and fulfils the conditions for being 'An eligible body' as described in the *HMRC document*

Guidance: Education and vocational training (VAT Notice701/30): Section 4.1.

<https://www.gov.uk/guidance/vat-on-education-and-vocational-training-notice-70130>

2. Balint Society events are fulfilling the educational purpose of the Charity.

To promote and advance discussion groups using the Balint method, and research and studies on the psychological aspects of health and social care, with special reference to the professional-patient / client relationship and to disseminate this knowledge beyond the Society for the improvement of the care of the public at large.

Balint Society Constitution 2016, Objects

3. What is 'An eligible body'?

With effect from 1 August 2019 an eligible body is:

- A school, sixth form college, tertiary college or further education college or other centrally funded further education institution (defined as such under the Education Acts).
- A centrally funded higher education institution in Wales, Scotland and Northern Ireland (defined as such under the Education Acts).
- The governing body of one of these institutions:
 - a local authority
 - a government department or executive agency
 - a non-profit making body that carries out duties of an essentially public nature similar to those carried out by a LA or government department
 - health authority
- **A non-profit making organisation that meets certain conditions:**
 - **That cannot and does not distribute any profit it makes.**
 - **With any profit that might arise from its supplies of education, research or vocational training is used solely for the continuation or improvement of such supplies.**
- A commercial provider of tuition in EFL, in which case special rules will apply.
- **A university.**
- A higher education provider registered in the approved (fee cap) category of the register maintained by the Office for Students from the date of inclusion in the register.