



British Society for  
Research into  
Learning Mathematics

[www.bsrlm.org.uk](http://www.bsrlm.org.uk)

**Executive Committee 2018-19**

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**Treasurer's Report 2018-19**

The BSRLM's current overall balance is £28,788.17. This figure has been reducing over the last few years. For the current year the just under £7500 difference from the 2017-18 total is accounted for largely by two outlays. Firstly, BSRLM commissioned a review of its informal proceedings from 2003-2017 and paid an honorarium of £4000 to a University of Brighton team who undertook this work. Secondly following considerable discussion regarding ways to address difficulties with the functioning of the website, the executive team has asked the current web developers to rebuild the site. This is currently underway; we have so far spent £3600 on this development with a further £1500 anticipated on completion of the work. A transfer of £8000 was made from the savings account in order to fund these two specific costs.

Aside from this website redevelopment, regular maintenance and some additional security updates result in a total expenditure on the website of £6753.70 for this year, close on double that of last year. The new website should ensure greater ease of use for members and exec team members alike and reduce some of the manual tasks that exec team members currently undertake.

Annual membership fees remain at £35 standard and £20 student/retired/unwaged. Approximately 180 members pay by a repeating standing order, the majority pay through Paypal on an annual basis. For those paying through Paypal a charge is levied on each transaction, but the advantage of this payment method is that membership status is updated automatically. For those paying by standing order the treasurer manually changes membership status on the website. The current web development should automate this process for all payment methods and offer a renewal reminder for current members. Membership income is lower this year than for the previous two years; many Paypal membership renewals are made just prior to conference attendance. This means that our membership levels are closely tied to our conference programme; strong conference attendance will render our membership base and resulting income secure.

Conference fee income this year matched that of the previous year, but both these two recent years have seen a reduction from 2016-17 and 2015-16 income. Conference costs continue to fluctuate depending on catering costs at different institutions and on whether we are able to use seminar rooms without charge. We have been fortunate this year to have been charged catering fees only at two of our locations. The cost per attendee of conferences over the three most recent years is shown below. For the current year conference expenditure is particularly low because we are awaiting an invoice from a recent conference.

Date	Location	Price per head
Nov 2016	Brighton University	£16.65
Feb 2017	London Mathematical Society (joint CFEM & BSRLM pre-conference event)	£50.67
	Birkbeck University (joint CFEM conference)	£39.95
Jun 2017	Oxford University	£20.36
Nov 2017	Liverpool University	£29.40
Mar 2018	Nottingham University	£13.73
Jun 2018	Swansea University	£17.88
Oct 2018	Kings College	£17.00
Mar 2019	Open University	£19.08
June 2019	Birmingham University	£14.55

The current balance of the Leone Burton Fund is £2,609.16. This fund is used to support New Researchers attending the NRD conference to stay overnight (up to £40) and join the next day's main conference. There was one donation to this fund during the 2018-19 year. Three claims were made on the Leone Burton fund for New Researchers at the Birmingham conference in June. This follows more explicit advertising of the fund by our day conference organisers.

The Janet Duffin account was set up by Janet's family and is used to refund expenses for the author of the winning RME journal article, when they come to give a talk at one of the Society's conferences. The current balance is £1746.34. Janet's family are keen to continue with this fund and they will be topping up this fund.

Please now find the accounts set down for Nov 2018-Oct 2019. The work on these accounts has been checked by Gwen Ineson.

Nancy Barclay, Nov 2019

University of Brighton

### Summary of accounts:

Balance at end of	October 2019	October 2018	October 2017	October 2016
Main account (inc Leone Burton)	3,698.72	2,866.91	2,767.80	6,431.89
Savings	16,743.45	24,639.45	28,631.52	28,617.40
RME	6,599.66	6,689.92	5,863.72	2,391.12
Janet Duffin	1,746.34	2,067.94	2,212.12	5,051.67
<b>Total</b>	<b>28,788.17</b>	<b>36,264.22</b>	<b>39,475.16</b>	<b>42,492.08</b>

### Co-operative Community Direct Plus account

Most BSRLM business is conducted through the Co-operative Community Direct Plus account which acts as the main current account. The Leone Burton Fund is included within this account.

<b>Balance brought forward (01/11/18)</b>		2,866.91
<b>Income</b>	Membership	8,964.80
	Conference fee income	4,663.28
	Royalties from RME journal	3,855.31
	Transfer from savings account	8,000.00
	Leone Burton fund subsidy	5.00
<b>Total income this year</b>		25,488.39

<b>Expenditure</b>	Conferences	1,423.00
	JMC membership	360.00
	BSRLM committee expenses	3,393.88
	Website development & maintenance	6,753.70
	RME grant	2,000.00
	RME issues	6,606.00

	Leone Burton fund subsidies	120.00
	Honorarium	4,000.00
<b>Total expenditure</b>		24,656.58
<b>Final balance on this account</b>		<b>3,698.72</b>

...of which the **Leone Burton fund**

<b>Balance brought forward</b>		<b>2,724.16</b>
Income	Donations	5
Expenditure	New Researchers' Day claims	120
<b>Final balance</b>		<b>2,609.16</b>

#### **Co-operative Business Select 14-day account**

This account acts as a reserve fund

<b>Balance brought forward</b>		<b>24,639.45</b>
Expenditure	Transfer to current account	8,000.00
Income	Interest	104.00
<b>Final balance</b>		<b>16,743.34</b>

#### **Janet Duffin account**

The Janet Duffin fund was set up in 2008 with a £2000 donation from the benefactor. In January 2010, a further donation of £4000 was paid. The Janet Duffin award is made annually by the Society to the author/s of what is judged to be the most outstanding contribution, published in the Society's journal (RME). The author/s are invited to present the Janet Duffin Lecture and this account funds all expenses occurred.

<b>Balance brought forward</b>		<b>2,067.94</b>
Expenditure	Speaker expenses	321.60
<b>Final balance</b>		<b>1,746.34</b>

### RME account

This account is for the running of the Society's journal - Research in Mathematics Education. An annual transfer is made from the current account to fund the administration of the journal and the editor's expenses.

<b>Balance brought forward</b>		<b>6689.92</b>
Income	Transfer from current account	2,000.00
Expenditure	Admin	1,870.00
Expenditure	Editors' expenses	220.26
<b>Final balance</b>		<b>6,599.66</b>

### Summary of BSRLM accounts for last 3 years

	2018-19	2017-18	2016-17
Balance brought forward (inc Leone Burton Fund)	2,866.91	2,767.80	6,431.89
Membership income to current account	8,964.80	11,348.44	11,625.02
Conference fee income	4,663.28	4,204.64	6,059.76
Interest	0.00	0.00	0.00
Royalties	3,855.31	2,534.39	2,230.32
Leone Burton contributions	5.00	0.00	29.00
Transfer from savings account	8,000.00	4,000.00	0.00
total income	25,488.39	22,087.47	19,944.10
Total income (including balance brought forward)	28,355.30	24,855.27	26,375.99
Conference costs	1,423.00	4,852.04	10,277.95
JMC membership	360.00	360.00	165.00
BSRLM committee expenses	3,393.88	3,536.81	2,251.24
Website development & maintenance	6,753.70	3,459.51	5,580.00
RME grant	2,000.00	3,000.00	3,000.00
RME issues	6,606.00	6,780.00	2,010.00
Leone Burton fund subsidies	120.00	0.00	324.00
Transfer to business select account	0.00	0.00	0.00
Honorarium	4,000.00	0.00	0.00
Total expenditure	24,656.58	21,988.36	23,608.19
Final balance on current account	<b>3,698.72</b>	2,866.91	2,767.80
Savings Account			
Balance brought forward	24,639.45	28,631.52	28,617.40
Interest	104.00	7.93	14.12
Transfer to current account	8,000.00	4,000.00	0.00
Transfer from current account	0.00	0.00	0.00
Final balance on reserve account	16,743.45	24,639.45	28,631.52

Janet Duffin Account			
Balance brought forward	2,067.94	2,212.12	2,391.12
Interest	0.00	0.00	0.00
Expenditure	321.60	144.18	179.00
Final balance	1,746.34	2,067.94	2,212.12
RME Account			
Balance brought forward	6,689.92	5,863.72	5,051.67
Interest	0.00	0.00	0.00
Transfer from current account	2,000.00	3,000.00	3,000.00
Expenditure (admin and expenses)	2,090.26	2,173.80	2,187.95
Final Balance	6,599.66	6,689.92	5,863.72
<b>All accounts</b>	<b>28,788.17</b>	<b>36,264.22</b>	<b>39,475.16</b>