



Southwest District Council Talks:
**FINANCIAL PLANNING: DUES,
BUDGETING, FUNDRAISING, AND
GETTING YOUR CHAPTER TO
CONVENTION!**

YOUR SOUTHWEST DISTRICT COUNCIL!



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AGENDA

- I. **How** will you organize dues?
- II. **How** to create a budget your chapter can follow?
- III. **How** do people use chapter funds?
- IV. **How** to plan successful fundraisers?
- V. **How** will your chapter get to convention(s)?



HOW WILL YOU ORGANIZE DUES?

Planning your year from the start!

CHAPTER DUES/FINANCES

Overview:

- **Chapter Fee:** \$100.00
- **Member Dues:** \$145.00
- **Initiate Registration:** \$165.00
- **Honorary Membership:** \$165.00

Other Notes:

- Chapter Fee & Membership Dues are submitted with CPR's
- Initiate & Honorary Dues are 30 days after your chapter's 3rd Degree (NOT 1 month)



CHAPTER DUES/FINANCES

Submission:

- Let your chapter know ASAP when their dues are coming up
 - Announce at your last meeting of the previous year and/or via your chapters means of communication (ex. Discord)
 - Gives everyone time to prepare how they will be able to afford paying their dues
- Financing your dues
 - Allow brothers that may not be able to afford full cost by deadline a chance to pay the chapter in increments
 - Helps when dues are talked about before the upcoming year, can start plans as early as June if you do so!



BUDGETING

Creating & Maintaining an efficient budget

BUDGETING

What needs to be accounted for:

- Recruitment
- Social/Brotherhood
- Ritual & Regalia
- Fundraising
- District
 - Chapter Dues, attending convention, etc.
- Misc. Chapter needs
 - Google Drive Maintenance, etc.



BUDGETING

Larger Chapter

<i>Chapter Budget</i>			
Item	Budgeted cost	Amount spent	Amount left
Chapter Due	\$100	\$0.00	\$100
G-Suite	\$27	\$0.00	\$27
Senior Recognition	\$270	\$0.00	\$270
Miscellaneous	\$150	\$0.00	\$150
Officer Budgets			
Vice President of Membership	\$500	\$0.00	\$500
Vice President of Service	\$150	\$0.00	\$150
Historian	\$150	\$0.00	\$150
Brotherhood Relations Officer	\$400	\$0.00	\$400
Music Director	\$65	\$0.00	\$65
Ritual Maintenance (R&R)	\$250	\$0.00	\$250
TOTAL:	\$2,062	\$0.00	\$2,062



BUDGETING

Larger Chapter (Log)

Item	Category	Ammount
Chapter Due	Chapter Due	\$100
G-Suite	G-Suite	\$27
Rocket Ships	Chapter Gifts	\$66.58
Recruitment event snacks & drinks	Recruitment	\$25.48
Pictures	Shadow Box	\$18.81
Scrapbooking supplies	Shadow Box	\$11.18
Senior Recital flowers	Senior stuff	\$4.67
Alumni picnic snacks	Misc.	\$20
Paper	BRO	\$6.86
Glove and garbage bags	Misc.	\$38.93
Programs and music	Misc.	\$7.00
Chili Coog Off Supplies	BRO	\$11.42
Picture prints	Shadow Box	\$7.58
Senior Stoles	Senior stuff	\$67.86
Senior picture frames	Senior stuff	\$26.87



BUDGETING

Smaller Chapter

<i>Chapter Budget</i>			
Item	Budgeted cost	Amount spent	Amount left
Chapter Due	\$100	\$0.00	\$100
G-Suite	\$20	\$0.00	\$20
Miscellaneous	\$50	\$0.00	\$50
Officer Budgets			
Vice President of Membership	\$125	\$0.00	\$125
Vice President of Service	\$75	\$0.00	\$75
Historian	\$0	\$0.00	\$0
Brotherhood Relations Officer	\$0	\$0.00	\$0
Music Director	\$0	\$0.00	\$0
Ritual Maintenance (R&R)	\$0	\$0.00	\$0
TOTAL:	\$400	\$0.00	\$400



CHAPTER FUNDS

How chapters use their funds

CHAPTER FUNDS

Keeping up with Chapter Funds

- How will you efficiently track chapter fund usage?
 - Form for reimbursement
 - Chapter sees budget at first meeting of school year, so everyone (including position specific budgets) are aware of how chapter finances are being allocated and everyone is on the same page.



CHAPTER FUNDS

Reimbursing

- Create a form for reimbursement.
 - Allows less financial tracking stress in long run
 - Anytime a brother is reimbursed, log onto a sheet and let brother know how much is left in their budget.
- Who gets reimbursed
 - Reimbursements should go towards purchases accounted for in a chapter budget
- Request to Purchase Form
 - Can be pulled from a set aside money for certain instances not in a budget, ex. Trash Bags for cleaning up.



FUNDRAISING

How to get the most out of your chapter's fundraising

HOW TO FUNDRAISE

Ideal Goals

- *Is this overall profitable?*
 - If not, could it be beneficial in other ways?
- *Is it simple?*
 - Would this be possible for a majority of brothers to contribute to?
- *Does it conflict with any school rules?*
 - Ex. Beta Sigma's School of Music cannot sell certain food items in their building



HOW TO FUNDRAISE

Fundraiser Ideas

- Lobby Sale (Drinks, Snacks, Pizza, etc.)
- Profit Shares (ex. Raising Canes, MOD Pizza, etc.)
- Merchandise for your Marching Band
- District Marketplace
 - Selling shirts, buttons, etc. is a very great way to make money!



DISTRICT & NATIONAL CONVENTION

How will your chapter get to both District and National Convention?

DISTRICT/NATIONAL CONVENTION

District Convention

- **Average Cost per Brother: ~\$169.00**
 - **Hotel Room: \$149.00**
 - **Registration: \$120.00**

National Convention:

- **Average Cost per Brother: ~\$415.00**
 - **Hotel Room: \$225.00**
 - **Registration: \$190.00**



DISTRICT CONVENTION

- **How can I raise money to attend?**
 - **Alumni**
 - There is no shame in reaching out to your alumni!
 - **District & National Grants**
 - Your chapter can qualify for and receive financial support from both the district AND national level!



THANK YOU & AEA!

If you have further questions, need support, or advice, please reach out to your district council members and/or governors!

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