|  |  |
| --- | --- |
| **Chapter Name**  | Cascadia |
| **Chapter Number (ex. CH0000)**  | CH8029 |
| **Chapter Location (City, State)**  | Portland, OR |
| **Chapter Membership Size**  | Large (301+) |
| **Contact Person for this Submission:**  | Kathleen Elliott |
| **Email Address:**  | kleonetti@gmail.com |
| **Phone Number:**  | (503) - 293 - 4023 |
| **Chapter Board Position:**  | Director of Board Operations |
| **Chapter Website URL:**  | <http://astdcascadia.org> |
| **Submission Title:**  | Event Budget Form |
| **Submission Description:**  | We created an event budget form for our events. We created an accountability for those hosting an event to estimate their expenses and to record the vendors; this then allowed us to verify invoices and expenses that were legitimate for the event. Prior to an event, the leader must complete their expected revenue, but most importantly, their expenses. They must list the vendors they are planning to use, and what the expected cost will be. This then is approved. When the event happens and invoices are incurred, we can verify that each invoice is expected. If there is a large discrepancy in cost or an unexpected invoice, the event host will need to be consulted. |
| **Need Addressed:**  | Created accountability for the members to be good stewards of our funds, and allows a check and balance with expenses. This also is creating a recording of events to compare expenses for future events. |
| **Does this effort align with your chapter's mission?**  | - Yes |
| **Does this submission align with ASTD's mission?**  | - Yes |
| **Target Audience:**  | this serves all our members, but is a tool used by the leadership of the chapter |
| **Costs/Resources Used: (include any funding you were able to get through donations, contributions, barter, etc. and how you went about getting these resources. Also include how much volunteer/board member time this effort took)**  | This involved myself, sitting down and creating a spreadsheet and then asking for input by the leadership to implement. |
| **How did you implement: (please give a brief description)**  | We shared the idea with the leadership, explained the purpose and then with some refinements, implemented the tool. |
| **What were the Outcomes: (include financial, membership increases, target audience satisfaction levels, publicity for the chapter, and of the profession)**  | The outcomes will continue as we build a library of our costs for events. The leadership has embraced this tool, and we have minimized the miscellaneous invoices/expenses for events that have happened in the past. |
| **Lessons Learned: (hints and tips for other chapters who may be considering a similar effort)**  | Talking with leadership and letting them know why we were going to use this change, really helped get the "buy-in" we needed to make this tool work. |
| **Please list the specific ASTD chapter resources that helped guide you in the process of completing this best practice.**  | None, this is my own best practice, accounting |
| **Please attach any documents that help support this submission: (additional documents should be sent to** SOS@astd.org**)**  |  [Event Budget Form.xlsx](http://forms.astd.org/download.php?q=Zm9ybV9pZD0xMSZpZD00NyZlbD1lbGVtZW50XzE2) |

**Powered by** [**MachForm**](http://www.appnitro.com)