Budget Management & Accountability
(official requirement of Sorority Recruitment; required for each chapter & Panhellenic)

Information Distributed: to Alumnae and collegiate officers in March
Final Information Collected: One week after recruitment has ended, by midnight

Process Description
Panhellenic Council has established the Budget Management & Accountability Process to ensure that each chapter is fiscally responsible and good stewards of chapter funds and additional resources. Panhellenic Council expects chapters to effectively plan and maintain realistic spending for Sorority Life Recruitment. To maintain a balanced and fair budget between the sororities during Sorority Life Recruitment, Panhellenic requires chapters to detail all spending and resources used that will directly impact the Potential New Member recruitment experience.

What shouldn't be included?
Any spending that does not directly impact the Potential New Member is not required or recommended to be listed as part of the budget management process. Pizza and snacks at a voting meeting or a pre-recruitment sisterhood are examples of items not included on the Recruitment Budget Worksheet.

Spending Allowances
Spending allowances are detailed in the Sorority Life Recruitment Policies, Section 6: Recruitment Finances. Panhellenic council does not provide money to chapters for spending. Chapters must budget chapter funds for Sorority Recruitment spending or find other avenues for funding. Panhellenic Council provides guidelines to make chapter spending equal and fair for chapters.

Sorority Life Recruitment Policies, Section 6: Recruitment Finances detail spending/resources related to:
- Monetary Spending
- Donated Items
- Borrowed Items
- Previously Used Items
- Items purchased with Chapter member personal funds
- Items purchased for Summer, Orientation and Team Night Events

Purchases using Tax-Exempt
All purchases for Drury University Student Organizations are tax-exempt. Drury Sororities also receive this benefit and should use the Drury Tax-Exempt Certificate for EVERY chapter-related purchase. Each chapter may receive Tax-Exempt certificates from the Student Activities Office to use for these purchases. Panhellenic Council will not reimburse tax on any purchases and suggests that chapters adopt a similar policy, but provide allowances for circumstances where tax is unable to be removed from purchase.

If tax was paid, Panhellenic requests a short explanation as to why this was needed and if it was reimbursed from the chapter.

Recruitment Budget Worksheet & Receipt Copies
The Recruitment Budget Worksheet is the only acceptable form to be used for Recruitment budget tracking. The Recruitment Budget Worksheet is an excel spreadsheet that allows complete recruitment budget tracking in an organized, standardized process. There are multiple tabs to the worksheet, one for each category detailed in the Sorority Life Recruitment Policies, Section 6: Recruitment Finances. Chapters should document purchases as they occur or at regular intervals to ensure full inclusion of spending/resources used and should keep all required paperwork organized from the beginning.
Receipt copies must be clearly display the purchase date and purchase amount (please circle and/or highlight). Receipt copies must be filed in order of spending as detailed on the Recruitment Budget Worksheet.

Standards Accountability
Late, incomplete or disorganized Recruitment Budget Worksheets and supporting materials will not be accepted and will minimally result in fines to the chapter. Falsification of chapter spending will result in Panhellenic Judicial action.

Panhellenic Budget Timeline
- **March 1**: Budget Standards review with Alumnae
  - Basic overview to assist alumnae in providing support to the chapter
  - Alumnae are not required to complete budget for collegiates
- **March 8**: Budget Standards review with Sorority Recruitment Officers
  - Detailed overview to educate officers in completing budget tracking requirements
- **March 8-August 27**: Chapter tracks and documents recruitment spending
  - Any chapter member may be budget tracker—needs to be approved by chapter EC and is willing/able to provide detailed, organized information to the chapter and Panhellenic
- **August 13**: Budget updates as part of collegiate and alumnae “Get in the Loop meetings”
- **September 3**: Recruitment Budget Worksheet and receipt copies due to Panhellenic Advisor
  - 3 copies recommended, 1 copy required
  - Complete tracking electronically, print copies and put in folder/binder
  - Keep everything organized and in spending order
  - More information is better, help Panhellenic understand what is spent and why
- **September 4-7, 10**: Formal Budget Review
  - Meetings must be scheduled Monday-Friday
  - Budget review must be done on the computer and printed out for this meeting
  - 1 copy is required for Panhellenic
  - Chapter should bring copies of Budget information for themselves as well

Formal Budget Review
Each chapter will provide a complete and accurate Recruitment Budget Worksheet, including copies of all receipts, to the Panhellenic Council Advisor one week after Sorority Bid Day. Chapter Recruitment Officers will be required to present a Formal Budget Review to the Panhellenic Membership Experience Committee and the Panhellenic Advisor team within two weeks after Sorority Bid Day. The chapter recruitment chair should bring 3 copies of the Recruitment Budget Worksheet, receipts (in order of spending as detailed on the worksheet) and other attachments to the Formal Budget Review. The Formal Budget Review should include:
  a. Budget category review and rationale
  b. Budget receipts and attachments review, including use of Drury Tax-Exempt certificate
  c. Budget success and opportunities review from a chapter perspective
  d. Budget needs for next recruitment period
  e. Suggestion for improvement of Panhellenic Budgeting guidelines and process
  f. Success review of Panhellenic Budgeting guidelines and process

Please allow 30 minutes for the Formal Budget Review meetings:
- 20 minutes for chapter budget review
- 10 minutes for Panhellenic budget review

Attendance at these meetings will consist of:
- Panhellenic Membership/Recruitment Committee
- Panhellenic Membership/Recruitment Advisor
Chapter representatives that were involved in tracking/organizing chapter budget and can effectively answer questions or provide more information about budget spending.

Panhellenic Accountability For Recruitment Spending
Panhellenic Council will provide a Recruitment Budget Worksheet to chapters during the Formal Budget Review using the same timeline, forms and process as chapters. Panhellenic’s spending limit is adjusted based on the number of women participating in recruitment. Panhellenic is allowed to spend $30 per PNM participating in recruitment (amount of recruitment registration fee) and $7 per current member (t-shirt fee paid through dues in fall semester). Panhellenic is not allowed to exceed these limits and is encouraged to uphold the financial practices expected of chapters.