

KAPPA KAPPA PSI / TAU BETA SIGMA



DISTRICT CONVENTION HOST CHAPTER HANDBOOK

REVISED JULY 2015

KAPPA KAPPA PSI / TAU BETA SIGMA NATIONAL HEADQUARTERS

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Prior to bidding for convention, we strongly recommend that each chapter read this handbook and discuss any questions with their district governors & counselors. All bids to host district convention MUST have a director of bands and sponsor endorsement.

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About District Conventions

No two district conventions are the same. They vary from year to year, and from district to district, depending on the needs of the district and the opportunities that are available for each event. Conventions can be held entirely on-campus, entirely off-campus (such as at a hotel or convention center) or using a combination of the two (perhaps with meetings on-campus and the banquet and/or musical events at an off-campus venue).

Convention dates and times also vary widely. Some districts meet in early-to-mid March, others as late as mid-to-late April. One of the factors related to this is when the majority of the schools within each district have finals and finish the school year. Our members are students first – it is important to do our best not to schedule fraternity/sorority events during significant end-of-the-year campus events.

Even so, you can't please everyone. On some of our campuses, spring semester means men's basketball, women's basketball, men's hockey, women's hockey – and bands for each. Some of our band programs have additional commitments as well, such as invitational band clinics and intercollegiate bands. You can't schedule convention to avoid every conflict, but you can look at what your district has done historically, look at the sports conferences within your district, and talk with the chapters in your district about what's best for them.

Some district conventions run from Friday afternoon through Sunday morning. Others run Friday morning through Saturday evening. Again, this depends on what works best for your district. Nothing is set in stone, but if you're going to depart from your district's 'norm,' be sure everyone understands that ahead of time and that you have the support of the majority of the district so you'll have a successful convention.

Conventions are usually hosted by two chapters – one from Tau Beta Sigma, and one from Kappa Kappa Psi – located at the same school. Occasionally, if permitted by the district constitution, a school with only one chapter will be selected to host. When this happens, good communication becomes more important than ever. If, for example, a school with only Kappa Kappa Psi is selected, they may opt to ask a Tau Beta Sigma chapter at a neighboring school to share the hosting duties. Since the members from the neighboring school won't have the same knowledge of, or access to facilities at the host school, they'll have to work extremely closely with the 'local' hosts to make sure arrangements go smoothly. Enlisting a neighboring chapter is not required. Very successful conventions have been hosted by single chapters who worked closely with both district presidents to make sure both organizations had what they needed. The biggest thing to consider in this case is that Ritual equipment for the other organization will need to be arranged. This is not usually a problem.

How District Conventions Work

The district presidents are responsible for planning the convention schedule. This includes the order of business, length of sessions, workshops, workshop presenters, and so forth. The district presidents will work with the host chapters on the schedule, and *may* ask the host chapters or other district officers to help with specific arrangements. Ultimately, the responsibility for planning the convention falls to the district presidents. Each is required to submit their convention plan to their respective national presidents by December 1 prior to the convention.

The host chapter is responsible for securing facilities and equipment; arranging for the banquet; arranging group rates and room blocks with local hotels; determining how much the registration fee should be; advertising the convention; setting up and running both pre-registration and on-site registration including collecting money and providing receipts; providing nametags and wristbands; facilitating convention processes during the event; and other functions requested by the district presidents.

Host chapters have some national tasks of their own. They are responsible for preparing a convention budget, having it approved by the District Counselor(s) and Governors, and turning it in to National Headquarters by December 1 preceding the convention. They are also responsible for sending a completed District Convention Fact Sheet to Headquarters by January 1. The convention website and mailing are to be done by January 15, and the post-event Final Budget Report is due to Headquarters on May 5.

Your district may have additional requirements for host chapters – it's important to read both the KKPsi and TBSigma district constitutions for your district (and/or other governing documents such as a district handbook or joint district by-laws).

If this sounds like something your chapter is interested in doing, read on!

I. Prior to Submitting a Bid

Understand the Commitment

First and foremost: your chapter(s) must be committed to the work that comes with bidding for and hosting a convention. Bidding should not be something that a few people do with the idea that they'll convince the rest of the chapter if they are successful. Your bid may not be successful for any number of reasons, but if it is, your chapters need to be ready to hit the ground running. Understand going in that host chapter members do not receive free registration, free banquet, or other perks for taking on host duties. Host chapter members often find their work gives them a renewed sense of fellowship and strengthens their spirit of cooperation. But if they go into the job with a "What's in it for ME?" attitude, disappointment is sure to follow.

Host chapters also need to be healthy chapters. They should have consistent, effective membership levels, and a solid financial footing.

Get Buy-In From Your Director Of Bands and Sponsor(s)

The next step is to talk to your director of bands and sponsor(s). If this is more than one person, be sure to include them all. Your director and each chapter's sponsor(s) are required to sign off on your bid, and they will be important to your hosting duties if your bid is successful.

Background Research

It is essential that your chapter attends and actively participates in District Conventions before submitting a bid to host a District Convention. Keep copies of programs, schedules, registration forms and so forth for future reference. Note what works about them, and what you can improve on.

At District Convention, keep your eyes open and take notes.

- Does Registration flow easily? If not, why not?
- Are meeting, committee, and workshop rooms of appropriate sizes?
- Is it easy to find where you're going?
- Are host chapter members easy to find and able to answer your questions?
- Do the banquet logistics of venue, food, table set-up, etc. work well?

After that convention, review the convention minutes. Research convention registration fees and how many members attended.

Professional Help

If you are planning a hotel or convention center event rather than a campus convention, you may be interested in working with a professional conference planner. We are fortunate to have an alumnus, Krista Murphy, who works with our chapters “on spec” – at no charge to the chapters – with the understanding that if the proposed facilities she arranges are selected, she’ll be paid by the facilities. This doesn’t mean she puts the entire bid together, but she can be helpful in finding meeting spaces, catering, and lodging. She has worked with several districts, and with our national organizations on conventions.

Her contact information is: **Krista Murphy,**

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Picking a Convention Site

There are several factors to be considered when choosing a site. These include meeting facilities, lodging, banquet facilities, parking – including campus parking – and travel options.

Having all of the lodging in the same facility can foster more communication, fellowship, and unscheduled business meetings while convention is underway. However, a single facility is certainly not required for a successful convention.

TIP: If convention lodging and meetings are all planned for one site such as a hotel, be cautious with contracts that require large room block benchmarks in order to get meeting rooms at no charge. Your district counselor(s) and governors can help walk you through this process.

TIP: Some districts almost always meet on campus, using multiple hotels for lodging. Others almost always meet in a hotel setting, using a single facility for both meeting spaces and lodging. If your chapter’s situation does not fit your district’s ‘norm,’ consider talking with prior hosts from other districts about how they make their conventions work. Talk with your district governors and counselor(s) as well. They may have suggestions about how to sell a new idea to your district.

Meeting Spaces

The following are the minimal requirements for meeting rooms:

Joint Sessions – Require enough seating for all participants of both organizations (based on convention attendance) with a head table for business. Microphones, a screen and computer/projector combination are almost always needed.

Separate Sessions – Each requires enough seating for all separate participants in the Fraternity or Sorority (based on convention attendance) with a head table for business.

These sessions often happen at the same time, so two rooms are required. Microphones, a screen and computer/projector are almost always needed.

Committee Rooms – There will need to be enough rooms to conduct the committee business of your District. For closed committee such as Nominations, Awards, etc., make sure you have appropriate venues for privacy (e.g. covered windows to preserve the privacy of interviews and presentations). You can check prior minutes or convention schedules to get an idea of how many rooms were needed in the past.

Workshop Rooms - Make sure these are large enough to accommodate good attendance. If a workshop block has six workshops, make sure the six locations are large enough that every convention attendee can attend something. (If you have 200 attendees, and six rooms of 25 each, only 150 people will be able to attend. 50 people will have no place to go – this is unacceptable. Everyone must be able to participate!)

Exhibits and Sales – This area will need space for tables so that schools can display scrapbooks, chapters can sell merchandise, vendors can sell national supplies, jewelry, etc., and people can browse. Your chapter must consider such things as easy visibility (like a central hall) and security (a lockable room). Be sure to check with your university, hotel or venue for rules regarding exhibits and merchandise sales prior to putting in your bid. This will help determine the best venue and help prevent roadblocks in your future.

Reading Band – This should be a musically appropriate room with space for good participation. (Nothing may be scheduled during the reading band slot except auxiliary clinic.)

Auxiliary/Dance Clinic – This space should have high ceilings and appropriate space to work with flags, rifles and other auxiliary equipment. If you're planning to hold it outdoors, be sure you have a backup plan in case of inclement weather.

Banquet – This should be large enough to seat all the paying participants. Room layout and catering must be considered. Your district councils may want a head table; they may prefer to sit at reserved tables near the front. Either way, a microphone, lectern and small table for awards will be needed. Don't guess about the size of a room – talk with your potential caterer about how many people can be accommodated. Be sure to discuss the prices of a plated sit-down dinner as opposed to a buffet-style dinner when gathering information.

Hotel Questions to Ask

What is the price for four person occupancy in a hotel room?

What are the applicable taxes? (A tax of 13% on a \$89 room raises the price to over \$100 per night. Some places charge both lodging tax and city tax in addition to any state taxes.)

While KKPsi and TBSigma are tax-exempt organizations, the waiver is only good for certain taxes, and in certain situations.)

What is the check-in time? Check-out time?

How much is charged for overnight parking?

If you're looking at a one-location convention...

- Does housing in the same facility as the meetings make the meeting rooms free, without guaranteeing a specific number of room-nights?
- Does having the banquet in the same facility make the meeting rooms free?
- How close are the hotel rooms to the meeting rooms and banquet space?

Contracts – part 1

DO NOT enter into a contract that cannot be cancelled without a financial penalty until your bid has been approved and you know for certain that you will be hosting the convention. (More on contracts later!)

II. Preparing and Presenting Your Bid

Preparing the Bid Budget

It is important to create a solid budget for your proposal because you will be expected to deliver the facilities and services you have promised without going over the registration price you have quoted. If, for some reason, your budget has to change, you must create a new budget and provide it to your director of bands, sponsor(s), district counselor(s), district governors, and district councils. All chapters in the district must also be notified if the registration cost is going to increase.

Use the [budget form](http://www.kkytbs.org/forms/DistrictConvBudgProp.doc) [http://www.kkytbs.org/forms/DistrictConvBudgProp.doc] provided by National Headquarters. (The District Convention Budget Proposal is available online on the National Headquarters website, www.kkytbs.org, under Forms; Both/Shared Documents; KKPsi & TBS District Convention Host Information.) It breaks costs down clearly, and you won't have to recreate your budget on this form later, if your bid is successful.

Budget items include – but are not limited to:

Banquet	Transaction/swipe fees
Other meals	Wristbands
Meeting room rental	Printing
AV equipment	Postage
Office supplies	Telephone
Registration supplies	Banquet decorations

Transportation
Security fee

Gift
Other

You will also include chapter funds and any other monies that are going to be available to offset convention costs, in order to come up with a total. Divide that number by the reasonably expected number of participants, then round that number up to the nearest dollar and you have your registration fee.

The registration fee cannot cover entertainment in any form. Entertainment planned by the host chapters must be paid for by the host chapters. Entertainment planned by the district councils must be paid for with district monies or other funds. If you have questions about what constitutes entertainment, check with your district governors and/or counselor(s).

For a large district convention, the host chapters should each have \$1,000 in 'up front' money to cover deposits and so forth. The chapter can engage in fundraising before the convention if necessary. But if your budget shows that your chapters will be putting \$500 in for convention expenses, don't then try to raise \$5,000 from the district – you will be inviting difficult questions!

Hotel costs per room per night need to be included in the bid, but not as part of the budget because attendees will pay for this separately. If you have multiple hotels for your convention, make sure all locations and room costs are included in your bid.

Plan to be able to accept registrations and payments online, and to provide confirmations and receipts immediately after the registration is received. Not everyone will pay this way, but it will save you time in the long run. A reasonable transaction fee or "swipe fee" can be included in your registration as a legitimate expense, as long as it is the actual amount being charged by the entity handling your transactions. (When you build your budget, include the swipe fee for all participants, even though some may pay by check.)

The banquet cost must be included in the registration fee. Historically, chapters that have offered separate registration fees and banquet fees have lost money (at the chapter's expense) on the banquet. In addition, plan to use wristbands or some other proof of registration that will be worn throughout your convention – not just for banquet entry. They're another tool to help make sure that you, as host chapters, aren't stuck with unexpected extra expenses.

The Bid Packet

You need to have both electronic and hard-copy versions of your bid. Each should contain all required/relevant information. When preparing your bid, be sure to finish it early, leaving enough time for your director of bands and sponsor(s) to review and approve it.

Check to see how your district handles bid presentations. In some districts, bidding chapters provide two hard copies of the bid packet to present to the Convention Site Committee at District Convention, then make their electronic presentation to the committee and to the delegation at District Convention. Other districts require hard copies for each delegate.

To be acceptable to the national organizations, your bid must include a written endorsement from your director of bands and sponsor(s), and a written endorsement from the Office of Student Life, Office of Student Activities, Office of Student Affairs, or equivalent at your school. (This institutional endorsement may not come from an academic unit such as the Music Department or College of Fine Arts.) Your bid must also include all of the requirements listed in both the KKPsi and TBSigma district constitutions for your district. Be sure to **check BOTH constitutions** – they don't always match, and you don't want your work to go to waste because something is missing!

The Bid Presentation

Select members to be involved in presenting your bid. They should be extremely familiar with all of the information contained in the bid.

All members of the chapter who are attending the convention where you will be presenting your bid should know enough about what is in it to be able to discuss it with attendees from other chapters. The more you all help promote it, the better chance your bid has of being selected.

Some years, a district will have several high quality bids to host convention. But ultimately, only one can be chosen. If your bid is NOT selected, talk with Convention Site committee members, governors, counselors and other convention attendees about what the concerns were and how you can improve it for the following year. If you haven't already, you may want to consider hosting a smaller district event. This gives your chapter members an idea of what's involved, and can go a long way towards convincing your district that you're ready to be convention hosts.

III. Congratulations, You've Won the Bid! Now What?

First Steps

Once you have been awarded the hosting duties for the following convention, there is work to be done right away.

- Tell any chapter members who didn't attend convention that your bid was successful.
- Confirm the selected convention dates with your district governors and counselor(s).

- Tell your director of bands and sponsor(s) that your bid was successful and you'll definitely be hosting the convention. Be sure they put the dates on their calendars.
- Select/confirm who the convention host committee chairs will be.
- Reserve/confirm the meeting facilities.
- Reserve/confirm the banquet arrangements.
- Reserve/confirm the reservation arrangements with the hotel(s).

At a minimum, do the tasks listed above BEFORE YOU LEAVE CAMPUS FOR THE SUMMER!
If you wait, facilities and services may not be available for the dates you have promised. Changing convention dates affects other districts' conventions and the national leadership teams, and consequently requires the approval of both national presidents.

- Set up committees to divide the hosting duties. These can include – but don't have to be limited to – communications/website, registration/mailings/nametags, meeting room assignment, reading band/auxiliary clinic, musical performances, banquet, entertainment, hotel/lodging, and T-shirt/convention gift.
- Begin fundraising, if that was a part of your convention-hosting plan.
- Open lines of communication with the newly-elected district presidents.
- Once your fall semester starts, plan to meet at least monthly to check on committee progress and make sure things are moving ahead.

Contracts – Part 2

First and foremost: ALL CONTRACTS MUST BE REVIEWED BY THE NATIONAL EXECUTIVE DIRECTOR PRIOR TO BEING SIGNED.

Determine who will have authority to sign contracts for facilities and services. If hosting on a college/university campus, the institution may require your sponsor(s) or director to approve/sign any contracts. They may also require that reservations be made in the name of the School/Department of Music, or Band Department. Be sure to talk with your sponsor(s) and director about how this will work.

Get a copy of the contract early and send copies to the district governors and counselor(s) as well as the National Executive Director PRIOR TO SIGNING.

If you're planning a single-facility convention, signing a contract that guarantees a certain number of room-nights in exchange for free meeting space is a very dangerous gamble. Should your convention fail to use the agreed upon number of room-nights, your chapter may be held responsible for paying for the use of the meeting rooms. If those expenses weren't included in your budget, your chapter could end up losing money on the convention.

Be sure that the cost and specifications for any needed audio-visual equipment is included in

the contract for facilities. If hosting on-campus, make sure a technology assistant will be available throughout the day to assist with issues.

Once the contract is signed, send copies to your district governors and counselor(s). Keep the original in your "convention" files. Be sure to bring that with you to your district convention, in case there are any questions or problems with the facility management.

Host Chapter Deadlines

*In addition to the deadlines listed below, your district may have additional requirements. **CHECK both the KKPsi and TBSigma district constitutions** for your district.*

- **Dec. 1: Preliminary convention budget is due to National Headquarters.** Host chapters need to download and complete the District Convention Budget Proposal Form, well before this deadline. The form is located on the National Headquarters website (www.kkytbs.org) under Forms; Both/Shared Documents; KKPsi & TBS District Convention Host Information. The completed form should be emailed to your district governors and counselor(s) for their signatures well before the deadline. They will review the form, resolve any questions, and submit it to the National Accountant.
- **Jan. 1: District Convention Fact Sheet from host chapter(s) is due to National Headquarters.** Host chapters need to download and complete the District Convention Fact Sheet. The form is located on the National Headquarters website (www.kkytbs.org) under Forms; Both/Shared Documents; KKPsi & TBS District Convention Host Information. The completed form should be emailed to National Headquarters at kkytbs@kkytbs.org, as well as to the district governors and counselor(s).
- **Jan. 15: Convention Website & Mailers from host chapters are due.**
 - The District Convention website should be live with information for registration, hotels, maps, transportation options, costs, and all additional known logistics. If possible, your site should be ready to accept online registrations and payments.
 - Convention information shall be provided to the following via email or hard copy mailing by January 15:
 - All National Council members – both organizations
 - All Board of Trustees members – both organizations
 - National Headquarters staff
 - Your district's governors and counselor(s)
 - Your district's Councils – both organizations
 - All chapters and colonies within your district – both organizations
 - Invited guests (get this information from your district presidents)

- The host chapter(s) MUST do one form of the mailing (email or snail-mail) and make information available on the web. If the host chapter(s) cannot have a website for district convention information, they must contact their district councils and have the information posted on the district website(s).
- While Facebook and other social media platforms may certainly be used to promote your event, using one or more of them does not meet the previously discussed requirement for a mailing.
- **May 5: Final budget from host chapter(s) is due to National Headquarters.**
Download and complete the District Convention Final Budget Report well before this deadline. The form is located on the National Headquarters website (www.kkytbs.org) under Forms; Both/Shared Documents; KKPsi & TBS District Convention Host Information. Submit the completed form before the deadline to your district governors and counselor(s) for their approval. They will review the form, resolve any questions, and submit it to the National Accountant.

Working with the District Presidents

Open lines of communication with your district presidents early. Whenever possible, this should be joint communication. The core working group should include both district presidents, district governors, district counselor(s), and both host committee chairs. You may also want to include your sponsor(s) and director of bands, but these individuals may prefer scheduled updates rather than inclusion in all of the conversation.

Remember that it is the district presidents' job to create the vision and programming aspects of the convention. The host chapters' job is to handle facilities and services, and other tasks requested by the District Presidents.

The host chapters will work with the district councils, governors and counselor(s) on:

- Convention Schedule
- Meeting Spaces
- Reading Band/Auxiliary Clinic/Concerts/Musical Performances
- Banquet Details

Don't forget that the district governors and district counselor(s) are excellent resources who have a wealth of experience and can be very helpful as issues arise. They are the administrative officers of the district; you are required to keep them "in the loop" as plans are made.

Registration Packages and Deadlines

When determining your registration packages and deadlines, keep it simple. For example, if purchasing a convention t-shirt is going to be optional, do not create one package with the

shirt and one without – set one price for the registration package, and make the t-shirt an add-on. This way, when someone asks, “How much is registration?” you have a simple, easy answer.

Set your deadlines to allow you to meet your contractual obligations. If your caterer requires an estimated number three weeks out, and a final number seven days out, set your deadlines accordingly.

Fictional District Convention – Friday through Sunday, April 3 - 5

Contractual Deadlines

Estimated banquet number due March 14

Final number banquet number due March 21

Registration Deadlines

Early registration ends March 10 ; late registration begins

Any registrations received after March 16 are not guaranteed banquet seating

Don't list a “final registration deadline” unless you are not planning to accept walk-ins.

Be sure to have a cancellation and refund policy, and to include this in all of your registration materials. For the 2015 National Convention, for example, no refunds were given for cancellations received after June 24. (Convention was held 7/28-8/2.)

Your district governors and counselor(s) should see your and approve your deadlines before they are published.

Publicity/Communication

January 15 is the **DEADLINE** for all host chapters to have a **live convention website** with completed registration and general information for their convention **and an email or snail mailing** to all National Council members – both organizations; all Board of Trustees members – both organizations; National Headquarters staff; your district's governors and counselor(s); your district's councils – both organizations; all chapters and colonies within your district – both organizations; and invited guests (get this information from your district presidents). It is completely fine to have this done before the Jan. 15 deadline!

Feel free to use as many other mediums as you like to announce and promote your Convention. Some possibilities include:

- Snail mail mailings
- National & District listservs
- District websites
- Email announcements

- Facebook
- Twitter

Convention T-shirts

As host chapters, you have the privilege of selling district convention T-shirts. This can help offset any expenses that won't be covered by the convention registration fees. Take a look at past shirts and try to come up with a design that's different. You might consider using your theme and convention logo along with the district name and event dates. Take a look at the KKPsi and TBSigma branding standards to be sure your design does not violate them, and avoid using the crests of KKPsi and TBSigma to avoid issues with membership candidates and colony members. Taking orders along with convention registration is a good way to know how many shirts to order, and in what sizes. Remember to use a KKPsi/TBSigma registered vendor. You can find those lists on the National Headquarters website at <http://kkytbs.org/vendors.html>.

IV. Convention Time

What to Expect

Host chapters are responsible for on-site registration. As each person registers, he or she needs to show an appropriate membership card and a photo identification. Those who don't have membership cards must be verified in the OMRS. Chapters should bring a letter from their director or sponsor listing membership candidates who would not yet appear in the OMRS. If there are questions or problems, contact one of your district governors or counselor(s), or one of the national representatives who are in attendance for help.

It's a good idea to schedule extra people to work registration during expected peak times. The faster people can get through the lines, the better first impression your chapters make.

Expect lots of questions! We recommend that host chapters have a t-shirt or other easily seen item of apparel that distinguishes their members as hosts, so that brothers and sisters can easily recognize them if they have questions or concerns.

Don't forget to invite your sponsor(s), director of bands, and other music faculty members to assist and to see your chapters in action.

Be sure you have adequate signage/maps/guides so that people can find their way from one place to another. You may need to coordinate signage with the facility, as improper signage may be removed before your participants have gotten where they need to go. Some chapters also post members at strategic points to help direct traffic.

Everyone in the chapter needs to do their share. Create a schedule for all chapter members for the duration of convention. This will help create accountability, and should allow for everyone to get some sleep each night. (Sleep is not over-rated. It helps you do your best work!)

Check with the district officers to see if they want a head table for the banquet, or prefer to sit at reserved tables at the front. Either way, be sure to reserve seating for National Officers, dignitaries, band directors, sponsors, etc.

Expect things to go wrong – they always do. Don't freak out when it happens, and use your available resources. These include your sponsor(s) and director of bands, governors, counselor(s), and national representatives. They're there to help you be successful!

V. Responsibilities After Your Convention Ends

Wrapping Up

Review your budget, income, and expenses to make sure everything balances out. Do not count convention T-shirt expenses/income in this accounting.

If you have a surplus of more than \$100 from the money you collected for registration, this money goes back to your district as a donation. Host chapters are not permitted to make a profit off of the convention itself.

If you sold convention T-shirts as a fundraiser, this money stays with the chapter(s). If there is more than one chapter hosting, the money is divided between/among the chapters accordingly.

The District Convention Final Budget Form is due to National Headquarters by May 5. The form is located on the National Headquarters website (www.kkytbs.org) under Forms; Both/Shared Documents; KKPsi & TBS District Convention Host Information. Submit the completed form before the deadline to your District Governors and Counselor(s) for their approval. They will review the form, resolve any questions, and submit it to the National Accountant.

CHECK both the KKPsi and TBSigma district constitutions to make sure there aren't any additional obligations that host chapters are required to meet.

After everyone in the chapter has had some sleep, review the hosting experience. Document any changes, likes, dislikes, suggestions, etc., and send them to your district governors, counselor(s), and district and national councils. This will be helpful for future host chapters!