

## Budget Planner

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An important first step for the charter year is to create a budget. The budget is based on activities you are planning for the year. It lets you know how much money you need to raise for projects, transportation for field trips, “swag” and big events like the National Keystone Conference.

### Preparation

- The purpose of this meeting is to create a budget for your Club year.
- Keystone officers and the Keystone advisor partner to facilitate the budget meeting with the team.
- Before this meeting, you should have used the **Yearly Planning Calendar** resource to schedule all important projects, events and activities your Club is planning for the charter year.
- Bring the completed **Yearly Planning Calendar** to the budget meeting.
- Print copies of the **Keystone Club Budget Planner** (pages 2-5).

### Step-by-step instructions

- Distribute copies of the **Keystone Club Budget Planner** (pages 2-5) to each Keystoner, or direct them to download it on their phones.
- Record highlights of the discussion and decisions the team makes on a flip chart.
- Use the **Keystone Club Budget Planner** (pages 2-5) to make a written record of your budget.
- Encourage all Keystoners to participate in the planning and make notes or follow along on their copies of the planner.
- Partner with your Keystone Club advisor to estimate the cost of all items in your budget.

### Follow-up

- After the budget is completed, you’ll do fundraising activities to raise money for these budgeted items. Use the **Fundraising Guidelines and Planner** resource to help you plan fundraising activities.
- Review your budget quarterly (every three months) or as often as you think is necessary.

## Keystone Club Budget Planner

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Name of Keystone Club \_\_\_\_\_

Year \_\_\_\_\_ Current charter level \_\_\_\_\_

<b>Project 1 – Community service</b>	
Description of expense	Estimated cost
<b>TOTAL</b>	

<b>Project 2 – Academic success</b>	
Description of expense	Estimated cost
<b>TOTAL</b>	

<b>Project 3 – Career preparation</b>	
Description of expense	Estimated cost
<b>TOTAL</b>	

<b>Project 4 – Teen outreach</b>	
Description of expense	Estimated cost
<b>TOTAL</b>	

<b>National Keystone Project</b>	
Description of expense	Estimated cost
<b>TOTAL</b>	

<b>Field trips or other Keystone Club events</b>	
Description of expense	Estimated cost
<b>TOTAL</b>	

## Keystone National Conference

Date of conference \_\_\_\_\_

Number of days (including travel days) \_\_\_\_\_

Number of members attending \_\_\_\_\_

Advisor(s) attending \_\_\_\_\_

Description	Cost per person	Total estimated cost
Registration		
T-shirts (or other materials for conference)		
Airfare (round-trip) Checked baggage Seat selection		
Hotel Day 1 Day 2 Day 3 Day 4		
Meals Breakfast Lunch Dinner		
Ground transportation (shuttle, bus, taxi) Club to airport Airport to hotel Hotel to airport Airport to Club		
Miscellaneous expenses		
<b>TOTAL</b>		