

PAC Tips

July 2011

We've Moved!

The Pioneers Headquarters and Denver PAC Office have moved to:

1801 California St., 44th Floor
Denver, CO 80202

Upcoming Events:

7/20/2011 - June monthly reports will be distributed to unit Presidents and Treasurers.

8/02/2011 - 2nd Quarter Percentage reports will be distributed to Chapter Presidents and Treasurers.

Training Updates:

- Make-up sessions for the General Ledger and Finance Basics classes will be offered in the month of July. Please reference the training schedule on page 6 of the PAC Tips.

Reminders:

- Postage Paid Business Reply envelopes are no longer available and **should no longer be used** to mail deposits to the PAC. **There is no guarantee that the deposits sent in those envelopes will make it to the PAC.** If mailing checks/money orders to the PAC to be deposited, please send the checks/money orders and TPF1 voucher to:

Pioneer Accounting Center
1801 California St., 44th Floor
Denver, CO 80202

Percentage Reports

Chapters, Councils and Clubs are able to allocate a portion of the cost of meetings/events to programs and projects when it is determined that a percentage of the time can be classified as “mission based” or programmatic activity. Allocating meeting expenses to General & Administrative and Project & Program 990 classifications can benefit each unit on the quarterly percentage reports that are distributed to the Chapter unit. Certain guidelines apply and are explained below:

Not all units are allocating their meetings in accordance to these guidelines currently but listed below is the procedure and a sample meeting minute breakdown for luncheon meetings.

By breaking down these meetings' costs will be between General & Administrative (G&A) and Projects & Programs (P&P) 990 classifications.

In order to assign certain meeting expenses between the two 990 classifications, the following qualifiers must apply:

- A portion of the meeting must be spent conducting Pioneer business (i.e., business planning, officer training, volunteer training, introduction to a new program or projects, an outside speaker re: business of Pioneering)
- A portion of the meeting time is dedicated to a Pioneer program or project (i.e., packing boxes to send overseas, gathering toiletries for a women's shelter, etc)

Once you have determined that your meeting expenses meet the qualifications, the following should be used to assign the expenses:

1. Calculate percentage of time spent on projects and programs. You do not have to be as detailed as the sample minutes; this is only to show you how to break it down. You can estimate the time spent on each breakdown if that is more reasonable.

$$\frac{\text{Time spent on projects and programs activities}}{\text{Total meeting time}} = \% \text{ Projects \& Programs}$$

2. Multiply percentage calculated above by the total meeting expenses:

$$(\% \text{ Projects \& Programs}) \times \text{Total expenses} = \text{Projects \& Programs expenses}$$

3. Code the percentage of Projects & Programs expenses to the Projects & Programs (P&P) 990 classification.
4. The remaining meeting expenses should be coded to the General & Administrative (G&A) 990 classification.

Please see the unit meeting voucher example as well as the example meeting minutes.

Please contact your PAC Associate if you have any questions.

Unit Meeting Minutes

The regular monthly meeting of the Pioneers was held May 1, 2011 in the Pioneer office. The meeting was called to order at 11:00AM by the unit President. The unit President led the membership in the Pledge of Allegiance.

11:05 Roll Call

11:07 Minutes and the financial reports were read and approved.

11:15 Update to May Monthly luncheon location has moved to 1515 Main St. on May 15th 2011 at 11:30AM. A flyer was mailed to all members with the incorrect address for the luncheon.

11:18 Re-cap of Chapter Call from April 26th 2011 including upcoming deadlines.

11:23 New Business & Updates on monthly volunteer hours added to PALS.

11:38 May birthdays were recognized and a moment of silence was recognized for Pioneer members who have passed.

11:42 Assembled Military Boxes to send to troops overseas. (18 min P&P)

12:00 Meeting adjourned.

- 60 Minutes: Total Meeting Time
- 18 Minutes: Working on Projects & Programs
- 30% Allocation: $18 \div 60 = 30\%$
- 30% Allocation: Projects & Programs (P&P) 990 classification
- 70% Allocation: General & Admin (G&A) 990 classification

Fun Fact

All **income account codes** begin with the number **4** and all **expense account codes** (excluding store account codes) begin with the number **6**.

Make-up Training Sessions for July

The PAC will be offering limited make-up sessions for individuals who were not able to attend the scheduled training time(s) with their Chapter.

General Ledger Coding:

July 22, 2011 – 10:30am to 11:30pm (mountain) – Liz Sparks

July 29, 2011 – 10:30am to 11:30pm (mountain) – Liz Sparks

Finance Basics:

July 27, 2011 – 10:30am to 12:00pm (mountain) – Tammy Ewing

Registration:

Registration for makeup sessions is done through WebEx. You will receive your training materials via email prior to your session.

1. Go to telecompioneers.webex.com
2. Browse the **Monthly** calendar for the session you would like to attend.
3. Click on the session from the calendar
4. Click on **Register**
5. Fill in your name and email (in the company field, please provide your chapter)
6. Click **Register Now**

If you do not have online access, please contact the trainer for the session you would like to attend. The trainer will register you for their session and will send training materials via standard mail.

Trainer contact information:

Liz Sparks (888)477-3158 or lsparks@pioneersvolunteer.org

Tammy Ewing (888)531-9776 or tewing@pioneersvolunteer.org