

APhA2023

Annual Meeting & Exposition

Phoenix | March 24-27





APhA-ASP Finance Vice Presidents Meet-up

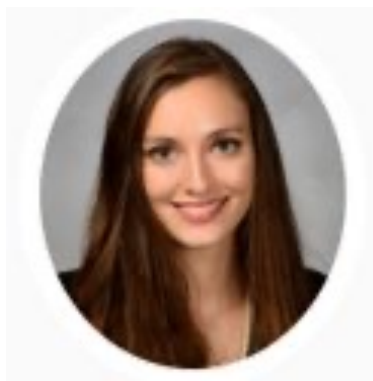


Presenters

2022-2023 Awards Standing Committee



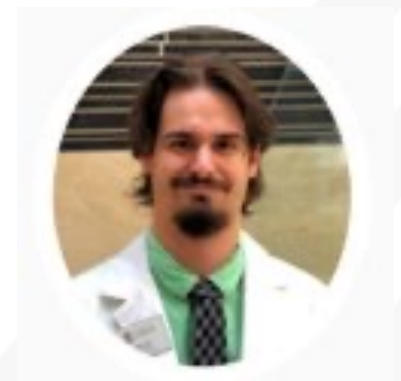
Courtney Woo
Chair



Katie DeBary
Member



Jennifer Garson
Member



Caleb Greer
Member



Agenda

- Introductions
- Roles & Responsibilities
- Financial Planning
- Timeline & Events
- Resources
- Q&A
- Mix & Mingle
- Announcements

Introductions



Join the Poll

<https://meet.ps/APhA2023-FVP>



Which statement best describes you?

- I am currently serving as the Finance Vice President.
- I am the incoming Finance Vice President.
- I am interested in learning more about the Finance Vice President role.

Go around the table and share...

- Name
- School or College of Pharmacy
- Year in School
- Whether you are the current officer, incoming officer, or interested in learning more about the position.

Answer one of the questions below:

Current Officer	Incoming Officer	Interested
What has been your greatest accomplishment this year?	What are you most looking forward to in serving in this role?	What would you like to learn about the position?

Please indicate at the beginning of your response whether you are a current officer, incoming officer or interested in learning more.

Roles & Responsibilities

Roles & Responsibilities

Serving in one of the chapter's most vital roles can ensure the future success and fiscal health of your chapter's operations.

Responsibilities:

- Manage the chapter's finances
- Maintain accurate and up-to-date records on chapter income and spending
- Coordinate chapter fundraising efforts
- Create continuity plans for the leaders coming after you

Roles & Responsibilities

- Create a budget for chapter operations and update it frequently throughout the year
- Advise chapter officers on spending and project financial management
- Process checks, invoices, and reimbursements for the chapter
- Understand and adhere to your institutions banking requirements

Financial Planning

A decorative graphic in the bottom right corner consisting of several overlapping, nested chevrons or arrowheads pointing upwards and to the right. The chevrons are rendered in different shades of blue, creating a sense of depth and movement.

Developing a Budget

- Gather Information
 - Income and expenses
 - Fundraising
 - Previous Operational Costs
- Plan Ahead
 - What are the goals of the chapter?
 - What will be the same or change?
- Estimate Costs and Finalize Budget
 - Make sure to work with your chapter when developing your budget
- Revisit and Manage

SAMPLE CHAPTER PROGRAM BUDGET				
	Estimated	Estimated total	Actual	Actual Total
INCOME/REVENUE				
Money allocated from APhA Dues	\$500.00		\$500.00	
Money raised from fundraisers	\$1,000.00		\$750.00	
Donations				
Contributions				
Department Funding				
Other				
Revenue Totals		\$1,500.00		\$1,250.00
EXPENSES				
Supplies and Equipment				
Marketing				
Posters	\$200.00		\$150.00	
Banners	\$150.00		\$150.00	
Printing				
Flyers	\$10.00		\$5.00	
Expense Totals		\$360.00		\$305.00
TOTAL:		\$1,140.00		\$945.00

Key National Events to Budget For

APhA Institute on
Substance Use
Disorders Meeting
Registration and Travel
(June)

Sending 1-2
Representatives to
Summer Leadership
Institute
(July)

Midyear Regional
Meeting (MRM)
Registration and Travel
(Oct.-Nov.)

Innovative
Programming Poster
for MRM
(Oct.-Nov.)

Annual Meeting
Registration and
Travel (APhA2024)
(March)

Sending NPCC
Representative to
Attend APhA2024
(March)

Key Chapter Events to Budget For

Fall and Spring
Membership
Drives

APhM

Chapter EC
Retreat

Chapter
Meetings

Social Events

Expenses to Consider

Promotional
Materials

Events,
Retreats,
Socials

Supplies

Travel
Expenses

Rental Fees

Food at
Chapter
Meetings

Supporting Chapter Members

- Fundraising to support meeting attendance (registration, travel, accommodations, etc.)
- Disseminating information for scholarship opportunities
- Exploring grants or sponsorship opportunities to support chapter events/initiatives
- Encouraging chapter members to apply for school travel funds
- Advocating for school support for attending professional development events

Supporting Chapter Members

- **Conduct Chapter Fundraising Events**
 - Examples include t-shirts, hats, coffee mugs, blankets
- **Create a Relationship with your State Association**
 - May be opportunities for the local State Association to support the chapter
 - Financial donations
 - Fundraiser or event collaboration
- **Scholarship Opportunities**
 - Innovative Programming Award
 - Regional winning chapters receive two complimentary registrations for APhA2023
 - Institute on Substance Use Disorders scholarships
 - APhA Foundation scholarships

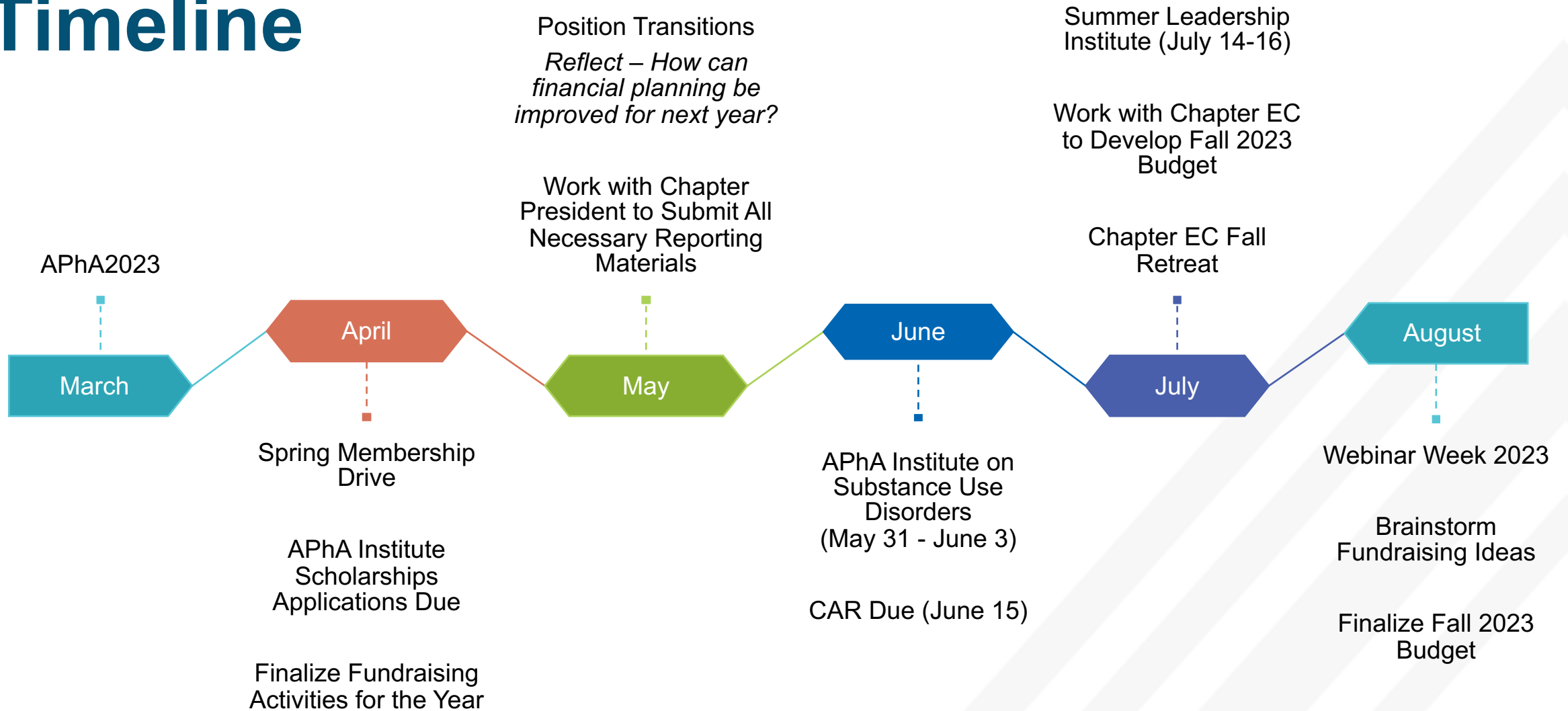
Supporting Chapter Members

- **University Travel/Professional Development Funds**
 - If your school does not provide financial support for meeting attendance, set up a meeting with appropriate contacts to discuss future funding opportunities.
 - Explain the benefits of meeting attendance
 - Networking
 - Professional Development
 - Leadership Development
 - Develop a deliverable for Chapter Members to turn in after the conference in order to receive funds
 - 1-page reflection
 - Presentation to the chapter on their experience

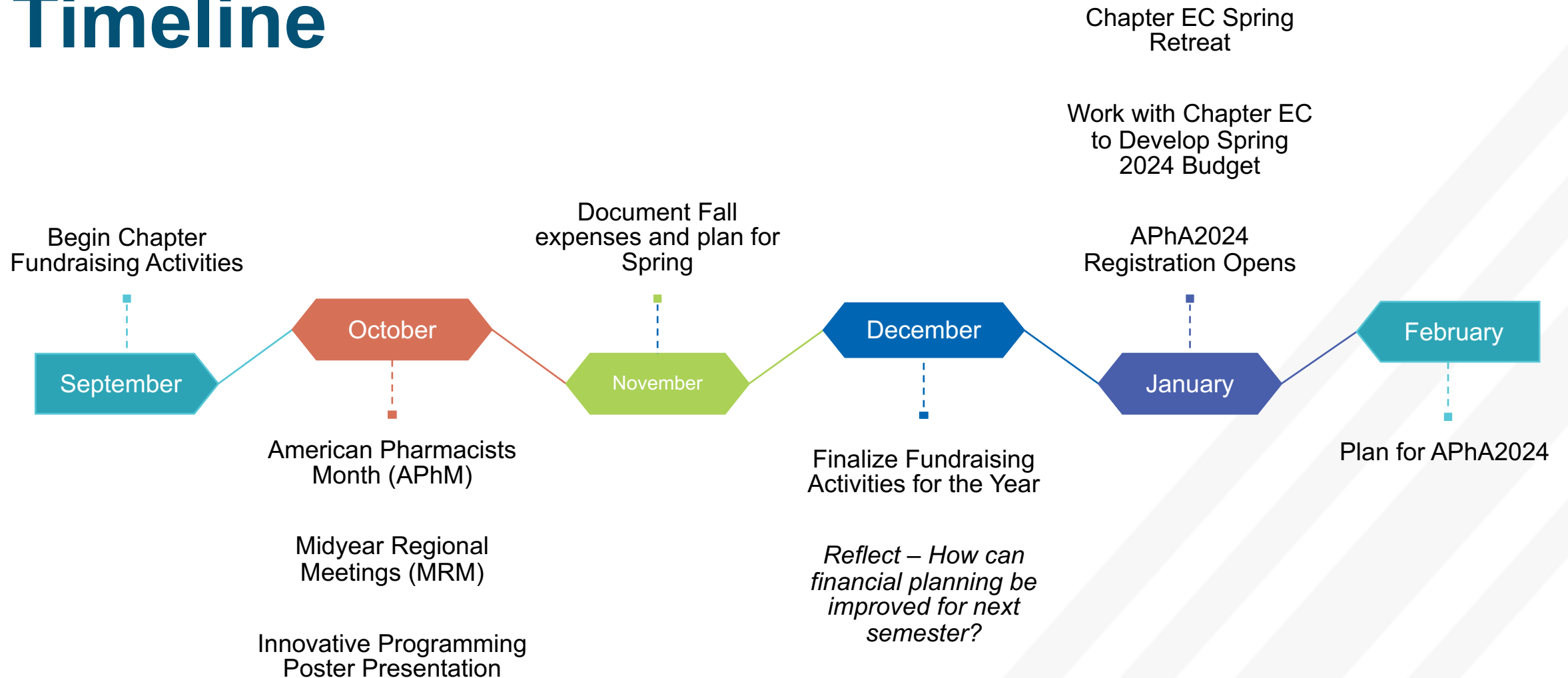
Timeline and Events

A decorative graphic in the bottom right corner consisting of several overlapping chevrons pointing upwards and to the right, rendered in a lighter shade of blue than the background.

Timeline



Timeline



Event Planning

- Key points
 - Work with your team to pinpoint the main goals of the fundraiser or event
 - Know your audience and who you would like to sell the product or experience to
 - Market according to your audience
 - Always follow your university guidelines when setting up an event



APhA-ASP Event Planning Checklist & Timeline

Proposed Event Title:	
Proposed Event Date:	
Proposed Event Description:	

8 weeks before the event: Determine the goals

Event Type	<ul style="list-style-type: none"> • Patient-care project • Educational • Fundraiser • Professional/leadership training • Social gathering (networking)
Main goals	
Target Audience	<ul style="list-style-type: none"> • Student pharmacists on-campus • Student pharmacists outside of campus • Faculty members on-campus • Community members
Event Date	<ul style="list-style-type: none"> • Check University calendar for potential conflicts • If the event is targeted for student pharmacists, check their class and exam schedules for potential conflicts
Is there a duplication of another campus event?	<ul style="list-style-type: none"> • Yes • No • Potential

General Considerations for Developing a Fundraising Event

1. Identify a product or service to fundraise
2. Run the idea past your Chapter Advisor and any other parties at the University whose approval you may need
3. Review the economics and create a business plan
 - a) Questions to ask yourself:
 - Does the price change based on the number of items purchased?
 - Will those buying the item sign up and pay for it ahead of time or will the chapter buy a limited number to sell?
 - What price per item is the breakeven price? What is the goal profit margin?
 - Are there any costs associated with marketing the item?
4. Work with the Communications VP to create a marketing plan to the University
 - a) University newsletter
 - b) Email
 - c) Social Media
5. Schedule or reserve tabling times for selling the item
 - a) Set up a fundraising table near a common study space
 - b) Review class schedules for when and where to set up a fundraising table
6. Purchase and distribute fundraising item/host fundraising event

Fundraising Ideas

Auction

Business
Card
Fundraiser

Valograms
and
Boograms

"Dress Down"
Days

Raffle

Social Events
(Formal,
Pagents)

Answer one of the questions below:

Current Officer	Incoming Officer
What is one piece of advice you would give yourself if you were starting your role over?	What is one question you have regarding your new position?

Please indicate at the beginning of your response whether you are a current officer, incoming officer.


Answer one of the questions below:

Current Officer	Incoming Officer
What was your favorite event or responsibility this year?	What event or responsibility are you most excited for in your new role?

Please indicate at the beginning of your response whether you are a current officer, incoming officer.




Resources

APhA-ASP Chapter Officer Resources



APhA-ASP Chapter Officer Resources

Running a student chapter has many facets. To tackle as many projects as possible, these resources have been developed to provide chapter leaders with information to assist in managing a successful chapter. Use these resources and templates to accomplish your goals and tasks.

Resources For Chapter Presidents, Vice Presidents And Chairs

Presidents and Presidents-elect

- [APhA2022 President and President-elect Workshop](#)

Communications Vice Presidents

- [Communications Vice President Toolkit](#)
- [APhA2022 Communications Vice President Workshop](#)

Finance Vice Presidents

- [Budgeting](#)
- [Sample Budgets](#)
- [Fundraising](#)
- [Chapter Tax Information \(IRS\)](#)
- [Chapter Banking Information Update Form](#)
- [APhA2022 Finance Vice President Workshop](#)

International Vice Presidents

- [International Vice President Toolkit, and IPSF Campaign, Project and Student Exchange Resources](#)
- [APhA2022 International Vice President Workshop](#)



Budgeting Resources

- The "Budgeting" document provides details on the budgeting process as well as important considerations
- The "Sample Budgets" document is a great template to use when creating a budget
- Share these resources with the incoming Finance-VP's when it is time to transition!

Finance Vice Presidents

- [Budgeting](#)
- [Sample Budgets](#)
- [Fundraising](#)
- [Chapter Tax Information \(IRS\)](#)
- [Chapter Banking Information Update Form](#)
- [APhA2022 Finance Vice President Workshop](#)

Budgeting Resources

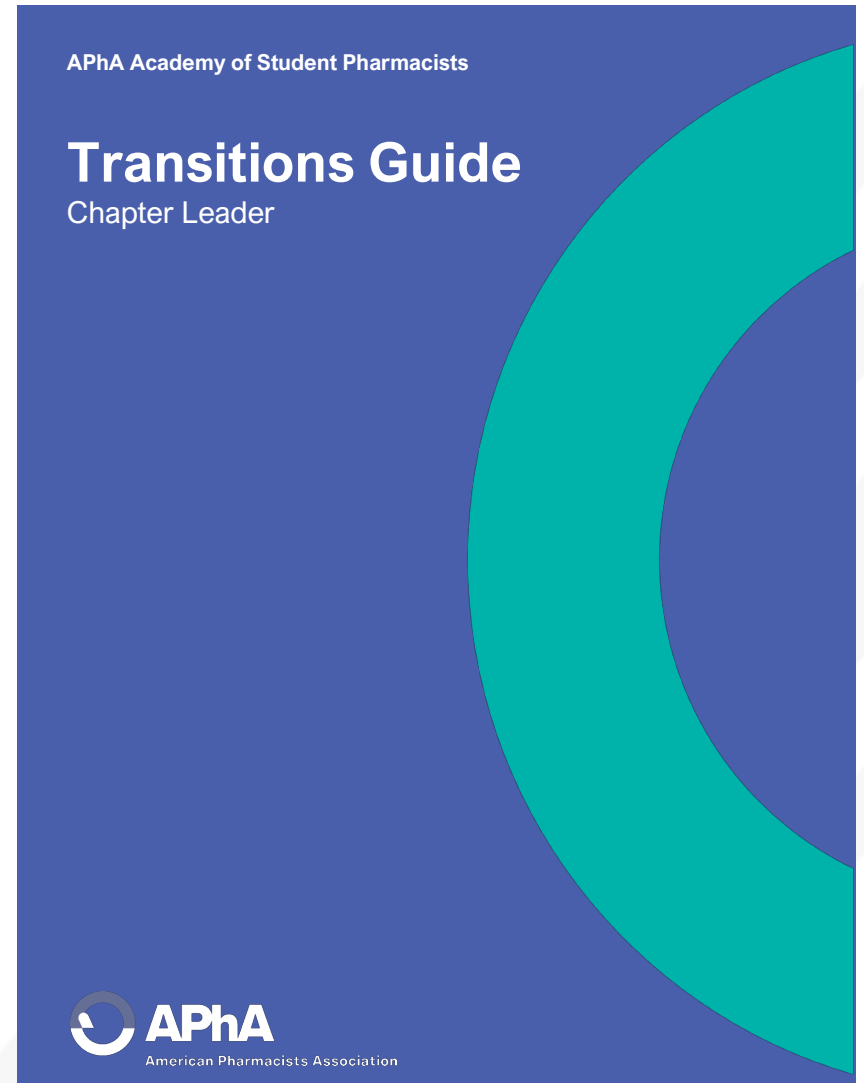
The "Chapter Tax Information Document" provides details on how to fill taxes (if applicable to your chapter) and answers frequently asked questions.

Finance Vice Presidents

- [Budgeting](#)
- [Sample Budgets](#)
- [Fundraising](#)
- [Chapter Tax Information \(IRS\)](#)
- [Chapter Banking Information Update Form](#)
- [APhA2022 Finance Vice President Workshop](#)

Transitions Guide

Under the *Additional Resources* section of the Chapter Officer Resources page.



Chapter Achievement Report (CAR) Toolbox

CAR Guidelines

Tracking Tool (CAA Reporting Tool)

Chronological List

Glossary of Terms

Essay Guidelines



Assisting with the Chapter Achievement Report

- The chapter budget will need to be uploaded when completing the CAR
- Be able to describe how the chapter budgets for the year
- Document if the chapter received any monetary awards or donations
- Know if and how the chapter filed taxes
- Be able to report the amount of money raised through fundraisers and describe the fundraising activities conducted

Chapter Achievement Report Workshop Webinar

Tuesday, April 11th from 8-9 pm ET



Answer the question below:

Current Officer

What resource has been the most helpful to you throughout the year?



Questions?





**What was your biggest
take away from the
session?**





**What additional
information do you
want or need?**





**What, if anything, can
APhA-ASP do to help
support you in your role?**

Announcements



Contact Information

Courtney Woo: rxcourtneywoo@gmail.com

Katie DeBary: kdebary96@gmail.com

Jennifer Garson: jgarson@purdue.edu

Samuel Greer: samuel.greer@my.uu.edu

Victoria Lyle: Vlyle@aphanet.org

APhA2023 APhA-ASP Attendee Resources



APhA2023 **RISE!** **ADVANCING IN THE FACE OF ADVERSITY**
Annual Meeting & Exposition
Phoenix | March 1-4, 2023

[APhA2023 APhA-ASP Attendee Resources](#)

Rise! Advancing in the Face of Adversity

We are looking forward to seeing you at this year's APhA Annual Meeting and Exposition in Phoenix! APhA-ASP programming is your chance to learn, network, and celebrate the accomplishments of your peers! From Career Sessions to Position Workshops to the APhA-ASP House of Delegates and Opening Session, the weekend is jam-packed with unique student pharmacist specific opportunities curated just for you.

For more top tips and need to know information for making the most of your APhA2023 experience, be sure to check out the APhA2023 Students Pharmacists Know Before You Go Video and review the Students Guide to APhA2023.

[f](#) [@](#) [v](#)

APhA2023 Know Before You Go - Student Pharmacist

Business Casual

Watch on [YouTube](#)

[Know Before Your Go Slides](#)

Chapter Achievement Report Workshop Webinar

Tuesday, April 11th from 8-9 pm ET





2:00-3:00 pm

**APhA-ASP Pharmacy
Power Hour**

Convention Center
Room 300 Foyer

3:00-5:00 PM

**APhA-ASP House of
Delegates**

Convention Center
Room 301AB



The Next Session Begins at 11:45 am

Region 1 Chapter Officer Debrief Alhambra	Region 2 Chapter Officer Debrief Deer Valley	Region 3 Chapter Officer Debrief Valley of the Sun C	Region 4 Chapter Officer Debrief Encanto A
Region 5 Chapter Officer Debrief Valley of the Sun A	Region 6 Chapter Officer Debrief Encanto B	Region 7 Chapter Officer Debrief Valley of the Sun B	Region 8 Chapter Officer Debrief Paradise Valley