

Rotary Leadership Institute - Heart of America (RLI-HOA) Event Budget Guide and Worksheet for 2023-2024

This guide and its attached worksheet provide RLI Budget and Participant Fee information to Districts for conducting RLI in the HOA Division during Rotary Year 2023-2024.

The “Standard” RLI-HOA Fee Schedule for each Participant, per RLI Part, in 2023-2024 is as follows:

Virtual event w/o materials = \$15

Virtual event w/ materials = \$30

In-Person event w/ materials = \$60

A “convenience fee” when paying by card online will no longer be charged when using the Standard RLI Fee Schedule.

This RLI Fee Schedule is built to provide approximately enough income to cover the expected costs of conducting RLI events including the administrative costs of the RLI-HOA organization.

Because the costs of conducting in-person RLI events sometimes vary significantly from district to district, using a higher or lower Fee for a specific RLI in-person event may be approved if requested and justified by the District RLI Coordinator. Ideally, RLI Events should cost no more than the total of the RLI Participant Fees charged times the number of paying participants. This overall event cost must include all the local reimbursable expenses (reimbursable by RLI-HOA) plus the expenses direct-billed to RLI-HOA for supplies and materials and the standard administrative expenses incurred by the RLI-HOA organization. The attached worksheet may assist the District RLI Coordinator in estimating the expenses and income for a RLI event.

To assist all of us in keeping RLI Fees as low as practical while covering our overall actual expenses, we are asking the District RLI Coordinator to submit a completed “Event Budget Worksheet” for each in-person RLI event planned. We know districts must make several assumptions in making their event budget estimate as an early step in getting their RLI event on the calendar with registration open. The purpose here is to just get an estimate of what the RLI Fee should be for the planned event. We believe a \$60 Fee will cover the expenses of most in-person events. However, if there is a high venue rental cost or high food and drink costs, then a higher Fee may be needed.

As an alternative to setting a higher in-person RLI Fee, a District may choose to internally cover the higher costs instead of raising the RLI Participant Fee.

If the District Coordinator occasionally orders a large quantity of supplies & materials to support multiple events (and possibly save on shipping costs overall), then it is appropriate to use a prorated amount of expenses from the large order spread over the RLI events supported. This may provide a more reasonable cost per participant and per event.

Attached is a simple RLI Event Budget Worksheet to submit with a request to open registration for an in-person RLI event.

RLI-HOA "In-Person" Event Budget Worksheet for 2023-2024

District # _____ RLI Coordinator: _____ RLI Event Start Date: _____ Parts: I II III Grad
circle planned parts

Estimated Expenses		Estimated RLI Fee Income	
Venue Rental	\$	Estimated Number of Paying Participants:	
Food & Drink	\$	X Planned RLI Fee:	\$
Travel Costs for Faculty from outside your District	\$	Equals Total Fee Income:	\$
Supplies & Materials ordered from RLI-HOA Supply, including shipping (direct-billed). <i>(\$15 per Participant is typical when providing a notebook for Part I and paper curriculum to all)</i>	\$	Total Estimated Expenses divided by Estimated Number of Paying Participants = <i>(Estimated Fee needed to cover costs)</i>	\$
RLI-HOA Organizational/Admin Costs <i>(\$10 each for all Participants [Fixed])</i>	\$		
Reimbursable Printing <i>(Purchased Locally)</i>	\$		
Reimbursable Supplies <i>(Purchased locally)</i>	\$		
Reimbursable Mailing Costs	\$		
Other essential reimbursable costs	\$		
Estimated Total Reimbursable and Direct-Billed Expenses:	\$	RLI Participant Fee Requested:	\$

Comments *(please comment on higher or lower than normal reimbursable/direct-billed expenses or special situations):*