**Chapter Operations Best Practices**

**TOPIC***:* PayPal use for technical meetings and conferences

**REGION VII EXPERTS:**

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**WHAT IS THE SINGLE MOST IMPORTANT THING TO REMEMBER ABOUT THIS ACTIVITY?** *Single most important thing to know goes here*

Getting it set up right at the beginning so the codes are correct for what you are trying to accomplish and keeping everything transparent is key.

Ensuring PayPal use and practice conforms to the ASSE Accounting Guidelines.

**Limitations of best practice:**

While it works great for technical meetings and conferences, not everyone is super familiar with PayPal and/or might be confused as to whether transactions are secure and/or what kind of identity and transaction protection may exist in the online marketplace for this kind of thing. The only feedback we have heard that is negative toward PayPal is that because it’s online, it is inherently less secure than typical mediums for chapter transactions like checks or cash.

**PLANNING AND PREPARATION STEPS:**

* Board needs to approve use of this service…there are transaction fees associated with PayPal
* Documentation required to set up PayPal: articles of incorporation and statement of tax exempt status from IRS as well as relevant account information for setting up connecting checking accounts…routing number / account number / bank information.
* Setting up and certifying account takes a few days….their process to ensure account validity cannot be done on short notice.

**KEY ELEMENTS FOR THIS ACTIVITY: (**information for implementing including examples, common errors, and tips)

* Once PayPal is set up, you can add “Pay Now” buttons to either emails or the chapter website for people to pay for technical meetings, tours (where a fee is assessed), training meetings, ASP/CSP seminars, even the ROC meeting….setting up the “Pay Now” button & shopping cart and getting the requisite code for insertion on emails or the chapter website is very easy…takes less than 20 minutes to get logged in and get a “button” set up that can be used for access to the shopping cart.
* Once transactions are processed, an email will be sent to the treasurer and president (or whoever you would like) letting you know that a transaction has taken place and monies have been deposited into the PayPal account.
* The monies in the PayPal account can then simply be transferred to the chapter checking or savings accounts as necessary for proper financial recordkeeping. This takes 1-2 business days, but may also depend on the checking account being used to which the funds will be transferred.
* Transaction fees for PayPal use are budgeted as “bank expenses” on our chapter budget.
* A sideline benefit of using PayPal is that it acts like an RSVP list of those people planning to attend a meeting or seminar….once someone has signed up, emails are sent and a running tally of where the deposits came from can easily be used as an RSVP list.
* Refunds can also be handled quickly through PayPal….if you decided to offer refunds. We do not offer refunds for technical meetings, but we do have built into our ASP/CSP class the ability to refund registration fees under certain circumstances and/or if the class ends up being cancelled due to insufficient attendance.

**OTHER RELATED INFORMATION:**

* The PayPal instant pay attachment (credit card reader) for iPhone or other smartphone is available, so point of sale at meetings can be directed to PayPal account. We have not chosen to go this route, but it is available for taking money or handling purchases at meetings/seminars, or other point of sale activities. There is a separate fee schedule per transaction for POS functionality, but the equipment and software (APP) are free.

**METRICS TO EVALUATE THE EFFECTIVENESS OF THIS ACTIVITY:**

* Evaluation by the board really serves as the only metric. The process of registering participants for meetings while giving them the ability to pay for technical meeting or seminar fees prior to the meeting in advance has seemed to increase attendance slightly. There are fewer people who RSVP and then don’t show….they have already paid their portion of the technical meeting cost, so our feeling is they are more inclined to attend because they have “skin in the game”.
* We tried having a meeting where PayPal was the only way to pay for the meeting fees and it worked very well. It did not seem to decrease participation and, was significantly easier to manage payments. The meeting in question was an event at the local zoo where we had to purchase tickets and were able to secure a discount by buying them in bulk ahead of the event. PayPal made this process very easy. Payments were made through PayPal, and from that list, I was able to purchase tickets to the zoo….then printed and handed out the advanced tickets to our members at the door to the zoo.