



Understanding Southern California World Service (SCWS) Finances

SCWS Assembly Meeting

May 18, 2024

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What Is A Budget?

- A budget is a guideline or a plan that shows where money is expected to be received from and how we plan to direct these funds
- It is required by our Bylaws in order to conduct the business of Al-Anon

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Who Supervises our Area Funds?

The Officers who are designated to be signers on our Bank accounts are our:

- Area Chair
- Area Treasurer
- Area Delegate
- Alternate Delegate

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Who Prepares The Budget?

“Areas plan for their financial responsibilities with an understanding and appreciation of the principle of self-support.

The Chairman presents a budget developed by members of the Area World Service Committee for the approval of the Assembly.”

What is our budget process?

- Annual Financial Planning Calendar: January (Board Meeting) initial discussions; February (AWSC) initial discussions; April (Board Meeting) plans presented; May (Assembly) budget process shared with GRs; July (Board Meeting) plans presented; August (AWSC) proposed plans and 2025 Annual Operating Funds presented, discussed and recommendations made; November (Assembly) presentation, discussion and vote on plans and upcoming year's Annual Operating Funds.
- To plan our 2025 annual operating funds, our Treasurer will prepare a proposal based on our previous year's financial data and request input from our SCWS Board, Finance Committee, AWSC & Assembly members.
- Each Coordinator has an opportunity and a framework to present their service Dream Project plans for 2025. This includes the timeline and planning for the number of volunteers, funds and other resources needed. We also allow flexibility for new information to come forward and new decisions to be made after Dream Projects are presented.
- At Fall Assembly (November), GRs review and discuss a summary (category) budget for our proposed 2025 annual operating funds, suggest changes as necessary and vote to adopt it.



Who else shares in our financial responsibilities?

- Per the 2019 AWSC vote, the role of the Finance Committee is to update and improve SCWS Treasury Policies, Bylaws, and Procedures.
- The committee is an advisory committee, not a decision-making body.
- Per the November 2018 Assembly vote, the GRs have approved our Area hiring a bookkeeping service
- We will begin updating the Treasurer position description soon to reflect this vote and sharing of responsibility.



Where does our money come from?

- Contributions:
Individuals
Groups
Districts/AIS
- Events/Programs:
Seventh Tradition from AWSC, Assembly
and Conventions



How and where do we allocate our Area funds?

- Delegate Equalized Expense to annual World Service Conference(WSC)
- Insurance
- AMIAS Background Checks
- Expense reimbursements for our trusted servants
- Area Service Projects (Dream Projects)
- Administrative Costs
- Professional Fees (e.g. Tax preparation)
- Contributions to WSO

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Looking Forward . . .

- Our finances are collaborative and we all have a voice in how we help shape them to fulfill our primary spiritual aim of carrying the message to families and friends of alcoholics.
- We look forward to your participation!

I have questions. Who do I contact?

- Interim Treasurer: Patty B interim-treasurer@scws-al-anon.org
- Chairperson: Micheila L chairperson@scws-al-anon.org