

Member and Staff Engagement in Clubhouse Fiscal Operations

Clubhouses need money in order to fulfill their mission. Good intentions are not enough. In any organization money is the “bottom line.” Consequently, in organizations generally money is the responsibility of top staff, such as a CEO or Comptroller, as well as professional experts, such as accountants and bookkeepers. Yet Clubhouses are different. Standard 11 states that members and staff are engaged “in all aspects of Clubhouse operation.” So engagement in the “bottom line” is crucial.

Implementing this engagement entails counteracting the predominant practice in society of entrusting fiscal management to high level and professionally trained staff. A person new to Clubhouse culture might react to Standard 11 by saying, “engagement in most Clubhouse operations, but not that!” **Yet Clubhouses have done it!** In response to an ICCD request, a number of Clubhouses have reported on many forms of member/staff involvement in Clubhouse fiscal affairs. The following summary is based on these reports.

First of all, there needs to be openness and communication throughout the Clubhouse on fiscal matters. This entails the executive director, the Board of Directors, or the auspice agency sharing with all in the Clubhouse information, concerns, and needs regarding the Clubhouse income, budget, and expenditures. It entails eliciting input from all in the Clubhouse regarding the handling of these matters. It is essential that there be no secrets.

Such communication and sharing can lead naturally to member/staff participation in the conduct of fiscal affairs. This can occur in a variety of forums – house meetings, a Budget Committee, unit work, and through members serving on the Board of Directors or the Advisory Board. It involves providing opportunities for broad input from members and staff throughout the house as well as engaging small groups of people in specific operations. Following are a variety of procedures that Clubhouses have found effective.

- A yearly budget planning process where initial projections on allocations of money are presented at house meetings or ad hoc meetings on specific topics, with adjustments, additions, and corrections made through discussion and consensus building.
- Planning by each unit regarding the cost of materials needed for their work, such as for food or office supplies, with this information then fed into the overall budgeting process.
- Establishment of a Budget Committee comprised of members, staff, and representatives from the Board of Directors, the Advisory Board, or the auspice

agency, where the committee gathers and coordinates budgeting information from throughout the Clubhouse.

- When an overall budget is finalized, a breakdown supplied to each unit on monies available to them on a weekly, monthly, or quarterly basis.
- Implementation of a record keeping system enabling each unit to keep track of expenditures in relation to budgeted monies.
- Counting, recording, and banking money received from members for Clubhouse services, such as meals, thrift shop sales, and housing.
- A centralized accounting operation where members and staff work in conjunction with bookkeepers to tabulate expenditures and income from throughout the Clubhouse, while acting in coordination with the executive director, the Board of Directors, or the auspice agency.
- Involvement of members and staff in income generation for the Clubhouse through fund raising events and advocacy and liaison with government and private funding agencies.
- Operation of a Clubhouse bank where members can open accounts and make deposits and withdrawals of their own money.

In some Clubhouses, staff salaries are public information within the Clubhouse, and members and staff are involved in budgeting and payroll operations for salaries. In most Clubhouses, however, salaries remain confidential. Bringing this aspect of Clubhouse operations into compliance with Standard 11 remains an ongoing challenge.

Clubhouses that have involved members and staff in fiscal operations report significant benefits. Neponset River House notes, "Members/staff learn skills that are both applicable to employment and can be used in their own lives. The more everyone knows where the money goes, the more they care when we go out to advocate for more funding." Magnolia Clubhouse states, "Everyone in Clubhouse benefits from seeing this work and knowledge being shared. Financial decisions are made at house meetings by consensus, and the process is smooth, as there is ongoing awareness of our financial operation." We hope this summary will be helpful in expanding this involvement.