SMIA Events and Fundraising Guidelines Committee

Summary of Work | November 14, 2026

Earlier this year, SMIA established a temporary committee to develop recommended guidelines that might help future Event Chairs and committees. The committee's goal was to put past experience and useful guidance in one place, while remaining mindful of Our By-Laws, Traditions, and Concepts.

The committee met in August, September, and October. Along the way, the members of the committee reviewed A.A. literature, GSO guidelines, SMIA's By-Laws, records from previous events, and shared experience offered by other members of our Fellowship.

The committee spent considerable time discussing event planning, finances, fundraising, outside contributions, anonymity, and the responsibilities entrusted to Event Chairs.

The committee received thoughtful contributions from members who have graciously served SMIA in the past. Their willingness to share experience and offer different perspectives helped shape the document being presented today. We're grateful for that participation.

The result is a relatively short set of guidelines, with references to the A.A. principles and SMIA By-Laws that helped inform our discussions. We've also included two practical appendices that future committees can use or adapt.

Where Do We Go from Here?

The committee is presenting the proposed Events and Fundraising Guidelines to SMIA for review and consideration.

We request that SMIA:

- **Accept the draft for review** and make it available to Intergroup representatives and their home groups.
- **Allow time for feedback**, including questions, concerns, and suggested changes, before considering adoption.
- **Revisit the guidelines** at the February 2027 SMIA meeting to discuss the feedback received and determine whether additional revisions are needed.
- **Consider adoption at a subsequent meeting**, once representatives have had an opportunity to consult their groups and SMIA is comfortable with the final document.

Motion: I move that SMIA receive the proposed Events and Fundraising Guidelines for review and distribute them to Intergroup Representatives for consideration by their home groups, with an opportunity to provide feedback, questions, and suggested revisions. The guidelines shall be brought back to SMIA at its February 2027 meeting to review the feedback received and determine any necessary revisions, with consideration of adoption at a subsequent meeting.

Questions for SMIA's Consideration

The committee would also welcome SMIA's direction on a few practical questions that may help future Event Chairs:

1. Financial expectations. Is each SMIA-sponsored event expected to cover its costs, generate a surplus to support SMIA services, or may some events operate with approved financial support when fellowship or service is the primary purpose?

2. Delegated authority. Once an event and its budget are approved, what decisions may an Event Chair make independently, and what changes or commitments should be brought back to SMIA?

3. Insurance and liability. Does SMIA maintain liability coverage for sponsored events? Who should verify coverage, venue requirements, and any additional insurance costs before an agreement is made?

These questions are offered for clarification and discussion, not for immediate decision today.

Southern Maryland Intergroup Association

DRAFT - Events and Fundraising Guidelines

Purpose and Use

"The primary purpose of SMIA shall be to aid in the relief and recovery of persons suffering from alcoholism ..." — SMIA By-Laws (2023), Article 2, Section 2.1

SMIA events help bring that purpose to life through fellowship, service, education, shared experience, and celebration of recovery. These guidelines offer practical support to future Event Chairs and committees in planning, conducting, and closing out SMIA-sponsored events. They complement—not replace—the SMIA By-Laws and existing approvals. [1]

1. Event Purpose and Expectations

Before planning begins, the Event Chair and committee should:

- Establish the event's purpose, whether it will be for fellowship, service, education, fundraising, or some combination of these.
- Clarify whether the event is intended to cover costs, generate a surplus for SMIA services, or operate with approved financial support.

These guidelines concern SMIA-sponsored or SMIA-authorized events, not independently organized district, area, or individual A.A. group events.

2. Authority and Event Planning

SMIA establishes and authorizes its activities under its By-Laws. Once an event and required funding have been approved through the applicable process, the Event Chair and committee should have reasonable discretion over routine planning and operational decisions, consistent with Concept Three's Right of Decision. [2]

"Every service responsibility should be matched by an equal service authority, with the scope of such authority well defined." — A.A. Twelve Concepts for World Service, Concept Ten, Short Form, (SMF-114)

The Chair remains accountable to SMIA and the authority delegated. Additional funding, substantial changes, or commitments beyond that authority should be referred through established SMIA procedures; these guidelines establish no new approval process.

The Chair should prepare an event plan that addresses date and venue, schedule, volunteers, accessibility, hospitality, publicity, registration, safety, anticipated participation, and costs. The Chair should share significant changes or concerns with SMIA and draw on past event records. Appendix A is an optional planning aid. [3]

Insurance and Liability. When selecting a venue or planning an event, the Event Chair should coordinate with SMIA to determine whether liability insurance is required and whether existing coverage applies. Any additional insurance requirements, associated costs, or contractual obligations should be brought to SMIA for consideration before commitments are made.

3. Budgeting and Financial Stewardship

The Event Chair should maintain a written budget showing anticipated income, expenses, deposits, and advance needs. Update it for material changes and compare it with actual results. [4]

The Event Chair is accountable for accurate event financial records, even when recordkeeping is delegated. Coordinate with the SMIA Treasurer for collection and safeguarding of funds, receipts, reimbursements, expenditures, and reconciliation. Promptly communicate anticipated deficits or significant financial concerns. All spending, disbursement, and audit requirements remain subject to SMIA's By-Laws; nothing here expands the committee's financial authority. [4]

4. Contributions, Fundraising, and Self-Support

Fundraising should be evaluated in light of SMIA's By-Laws and A.A.'s Sixth and Seventh Traditions. [5]

"All contributions of money, goods and/or services shall be accepted in strict adherence to the principle that we are self-supporting." — SMIA By-Laws (2023), Article 8, Section 8.1.

Games of chance. Raffles and other games of chance raise legitimate concerns regarding A.A.'s Traditions, self-support, and applicable gambling laws. Requirements differ across Charles, Calvert, and St. Mary's Counties. Legal permissibility alone does not establish that an activity is appropriate for an A.A. event. Such activities shall not be planned, advertised, or conducted without specific prior SMIA approval and verification of compliance with applicable laws. Approval of the event alone is not authorization for gambling-related fundraising. [6]

Outside contributions. Donated goods, gift baskets, gift certificates, or services from outside businesses, organizations, or agencies raise concerns about the Seventh Tradition and outside affiliation or endorsement under the Sixth Tradition. They should be discouraged regardless of value or intended purpose. SMIA events should remain self-supporting through voluntary contributions and participation of A.A. members. No outside contributions shall be solicited or accepted to avoid recognizing or promoting outside businesses in connection with SMIA events. [7]

5. Publicity, Anonymity, and Participation

Promote events accurately and welcome participants with attention to accessibility, hospitality, and safety.

Event Chairs and committees should uphold A.A.'s Eleventh and Twelfth Traditions concerning personal anonymity. The official A.A. Anonymity Statement Card (F-20) should be read at the beginning of SMIA events, particularly those open to non-A.A. attendees. Remind participants to respect others' anonymity, especially with photographs, video, and social media. Do not identify anyone publicly as an A.A. member; consent does not remove the need to preserve anonymity at the public level. Publicity should not imply A.A. endorsement of outside interests. [8]

6. Event Closeout and Continuity

The Event Chair will:

- Reconcile income, expenses, and outstanding obligations with the Treasurer and return remaining funds to the SMIA Treasury.

Event committees do not independently distribute surpluses. Apply the By-Laws' special-event account audit provision and the amended prudent-reserve provisions where relevant. [9]

- Provide SMIA a brief after-event report noting participation, financial results, what worked, challenges, and recommendations, financial records, useful vendor information, and publicity materials for future committees.

SMIA should retain these records centrally while safeguarding anonymity and sensitive information. Appendix B combines reporting and turnover. [10]

7. Inventory — A Moment of Reflection

As part of planning and reviewing an event, the Chair and committee are encouraged to consider a few simple questions:

- Does our event support A.A.'s primary purpose?
- Are we practicing self-support and avoiding outside affiliation?
- Are we protecting anonymity and welcoming all who wish to participate?
- Are we placing principles before personalities?

These questions are offered for reflection and discussion, not as additional requirements or approvals. [11]

Source Notes

[1] Southern Maryland Intergroup Association (SMIA), By-Laws (2023), Article 2, §2.1 (Purpose); Articles 4 and 7 (Management and Committees).

[2] Alcoholics Anonymous, Twelve Concepts for World Service, Short Form (SMF-114), Concepts Three (Right of Decision) and Ten (Service Responsibility and Authority).

[3] General Service Office (GSO), A.A. Guidelines on Conferences, Conventions and Roundups (MG-04); SMIA By-Laws, Article 8 (Fiscal Policy).

[4] SMIA By-Laws, Articles 5 and 8 (Treasurer, Financial Responsibilities, and Fiscal Policy).

[5] A.A. Traditions Six and Seven; GSO, A.A. Guidelines on Finance (MG-15); SMIA By-Laws, §§8.1 and 4.4.

[6] Maryland Criminal Law Article, Title 13 (Gaming—Local Provisions), including §§13-405 (Calvert County), 13-1810 (Charles County), and 13-2101 and 13-2111 (St. Mary's County); Maryland Secretary of State, Raffles of Real Property & Personal Property.

[7] SMIA By-Laws, §8.1; GSO, A.A. Guidelines on Conferences, Conventions and Roundups (MG-04) and A.A. Guidelines on Finance (MG-15); A.A. Traditions Six and Seven.

[8] GSO, Anonymity Statement Card (F-20); A.A. Traditions Eleven and Twelve.

[9] SMIA By-Laws, §8.8 (Special-Event Account Audits) and amended §8.7 (Prudent Reserve and Distribution of Funds).

[10] SMIA Committee meeting records, August 22, September 26, and October 24, 2026; prior SMIA event planning records and shared experience.

[11] Alcoholics Anonymous, *The A.A. Group* (P-16), "A.A. Group Inventory," pp. 29–30.

Appendix A — Event Planning Checklist

Adapt to the size and purpose of the event. This checklist is a planning aid, not an additional approval requirement.

Event Basics. Establish the event's purpose, proposed date, Event Chair, anticipated attendance, and whether participation is open or closed.

Financial Planning. Determine whether the event is intended to cover expenses, generate a surplus, or operate with approved financial support. Prepare a budget identifying anticipated income, expenses, deposits, advance funding needs, and ticket or registration accounting. Coordinate financial arrangements with the SMIA Treasurer.

Venue and Accessibility. Confirm location, reservations, capacity, parking, accessibility, facility rules, emergency exits, and basic safety provisions. Determine whether liability insurance is required and coordinate with SMIA regarding coverage and any contractual obligations.

People and Program. Identify committee responsibilities, volunteers, speakers, and the event schedule. Plan for setup, hospitality, refreshments or meals, and cleanup. Coordinate with the SMIA Bookstall when appropriate.

Communications and Anonymity. Prepare event announcements through appropriate channels, including the SMIA Lifeline. Plan for reading the A.A. Anonymity Statement Card (F-20) and remind participants to respect anonymity in photographs, recordings, and social media.

Traditions and Approvals. Consider A.A.'s Traditions, particularly self-support, outside affiliation, and anonymity. Confirm that proposed fundraising activities comply with SMIA guidelines, applicable laws, and any required approvals. Do not solicit or accept outside contributions.

Continuity and Turnover. Review available records and lessons learned from previous events. Plan for financial reconciliation, an after-event report, and the transfer of useful records and recommendations to SMIA.

Appendix B — After-Event Report and Records Turnover

Complete following the event and provide to SMIA for accountability, shared experience, and future reference.

Event Name: _____

Event Date: _____

Event Chair: _____

Attendance: _____

Financial Summary:

- Total Income: $_____
- Total Expenses: $_____
- Net Surplus / Deficit: $_____

Event Outcome: Did the event accomplish its intended purpose?

What Worked Well? Identify successful practices worth repeating.

Challenges and Lessons Learned: What could be improved?

Recommendations for Future Committees:

Date Reported to SMIA: _____

Event Closeout and Turnover Checklist

☐ Reconcile all income, expenses, deposits, and outstanding obligations with the SMIA Treasurer.

☐ Return remaining funds to the SMIA Treasury and complete any financial reporting requirements.

☐ Provide the final event budget, financial summary, receipts, and supporting records.

☐ Provide venue and vendor information, contacts, agreements, and relevant documentation.

☐ Record attendance totals and a brief summary of the event's outcome.

☐ Preserve useful planning materials, schedules, flyers, and publicity materials.

☐ Document lessons learned, challenges, and recommendations for future Event Chairs.

☐ Submit the completed after-event report and supporting records to SMIA for retention.

Records should be retained in accordance with SMIA procedures, with appropriate care for anonymity and sensitive information.