

## Role & Function: Treasurer

**Description:** The Treasurer is an elected member of the Executive Committee. The role of the Treasurer is to provide direct oversight of all fiscal operations of APBS.

Accomplishment	Sub-Accomplishments / Critical Dimensions	Measures	Standard
<b>BOARD &amp; COMMITTEE FUNCTIONS</b>			
Participate in Full Board Meetings	Communicate availability to attend Actively participate in Full Board Meetings Facilitate fiscal planning and operations as relevant	Meeting minutes	Meetings attended regularly
Participate in Executive Committee Meetings	Communicate availability to attend Actively participate in Executive Committee Meetings Facilitate fiscal planning and operations as relevant	Meeting minutes	Meetings attended regularly
Participate in General Operating Committee Meetings	Communicate availability to attend Actively participate in General Operating Committee Meetings Facilitate fiscal planning and operations as relevant	Meeting minutes	Meetings attended regularly
Executive Committee Liaison for Training & Education Committee	Actively participate in Training & Education Committee Meetings Provide status updates to Executive Committee on Training & Education Committee goals as relevant	Meeting minutes	Meetings held regularly
<b>OTHER MANAGEMENT</b>			

<b>Accomplishment</b>	<b>Sub-Accomplishments / Critical Dimensions</b>	<b>Measures</b>	<b>Standard</b>
<b>TASKS</b>			
Work with Executive Director and President to develop Annual Budget	Work with the Executive Director and President to create draft iterations of the proposed budget Solicit input and feedback from Full Board throughout process	Annual budget drafts and final version adopted by the board of directors at the annual March meeting	Approved, balanced budget on an annual basis
Provide leadership in both short term and long-range fiscal planning	Communicate and collaborate with other members of APBS leadership group regarding both short-term (annual) and long-term fiscal planning	Annual budget in tandem with long range fiscal plan for operation and growth reflected in APBS Annual Report	Approved and actionable long range fiscal plan reflected in the Annual Report
Monitor all fiscal operations of APBS	Provide oversight to all fiscal activities of the Executive Director and Bookkeeper relevant to ABPS business matters	Annual budget, tax return and non-charitable status renewal in target states (as guided by attorneys)	Timely and accurate submission of tax documents and Charitable Status Renewal documents in tandem with approved annual budget.

**Skill Sets Requirement**

- Experience in fiscal planning and annual budget oversight
- Ability to interpret fiscally related materials (i.e. bank statements, budget spreadsheets)
- Ability to communicate effectively with other individuals
- Writing Skills for various types of tasks
- Experience following Robert’s Rules of Order is helpful (This can be learned over time)
- Understanding and experience with general problem solving model