

Interesting Facts & Anecdotes

from your District Operations and Member Services Committee

October 2014

Did you know?....

Did you know the Vice Chair and the Treasurer can play significant roles to keep districts healthy, legal, and vibrant?

The VICE CHAIR office is full of opportunities, but only if the district is willing to ignore tradition, hop out of the box, and think strategically.

One meaning of the Latin word "vice" is "in place of." Following that ancient dictate the vice chair acts in place of the chair, waiting for that moment when he/she is needed to step up and fill in – almost always temporarily – only to slide back into the "officer -in-waiting" status when the chair returns.

What a waste of time, talent, and energy! How can we craft this officer position to be important and productive by carrying out regular duties all the time? That starts with the district being clear about what is needed. What value can this person add to ongoing functions or a new initiative?

Consider a few options, as teasers for your own creative thinking. The vice chair may:

- Oversee the work of committees and assist committee chairs
- Advise the board on program and policy
- Arrange programs for regular board meetings, such as monthly board training – snippet training's
- Oversee district initiatives needing special attention, such as volunteer programs, public relations, personnel management system, etc.
- Pay close attention to a new "start-up" program during its early years
- Keep the work of the district consistent with its vision, mission, and strategic plan
- And don't forget the ubiquitous "other duties as assigned"

So what does the vice chair do? The answer blends the needs of the district with the talent and commitment of the person. Make the vice chair an important, regular contributor rather than an individual waiting in the wings for their one moment to "rise and shine."

In fact, having regular duties centered on important, integral district functions makes them better equipped to act "in place of" the chair and maybe even be the chair.

And at long last we come to the TREASURER office. Many districts combine the secretary and treasurer functions into one office. If you read carefully the earlier DYK focusing on the secretary office, and add the following comments on the treasurer, you will know that is not a good idea: one person cannot do both jobs well, unless they are both truncated into minor obligatory functions.

The treasurer is the "eyes, ears, and conscience" of district finances. As such, he or she:

- Assures accurate accounting practices for posting, reviewing, reconciling, filing, record-keeping, and all the other tasks to keep a "good, clean, transparent set of books"
- Serves as chair of the finance committee
- Leads the budgeting process
- Receives, deposits, and disburses funds, or oversees such tasks, if assigned by the board to an employee or outside contractor
- Presents financial statements and reports at board meetings and the annual meeting
- Assists the auditor or reviewer to gain access to required financial documents, records, policies and procedures, and other materials requested
- Reviews the district's financial audit or review with district personnel prior to submitting it to the board; and sends copies of the audit to state or local agencies requiring them
- Obtains/provides fidelity or surety bonds for persons handling funds

What makes a good treasurer? Knowing bookkeeping or accounting is a big plus. But the person also needs to be detail-oriented while still able to "see the big picture," analytical, honest and straight-forward, knowledgeable of the rules and willing to enforce them ("why is there no invoice for this check?"), a little suspicious so things are right only when they are proved to be right, and have an ability to distance themselves from the "personal stuff" when doing reviews.