



Chapter Treasurer: Role Expectations

Thank you for accepting the responsibility of the Chapter Treasurer- this typically will begin a two-year term. The Treasurer is responsible for maintaining the chapter financial record and submitting chapter financial reports. This is a quick guide to help keep you and your chapter on track for a successful SUNA year!

Outgoing Treasurer

- Attend Chapter Meetings with the outgoing and incoming chapter officers (may be face to face or via conference call)
 - At this meeting:
 - Provide the chapter financial report
 - Help develop the initial chapter work plan (include goals for fundraising)
 - Assist with the plan on how to get all chapter officers participate
- Attend chapter meetings and provide financial report
- Obtain chapter records from the outgoing treasurer (if applicable)
- Get signatory privileges on all chapter accounts
- File your IRS 990-N report by **April 15** or submit your Annual Chapter Report to the National Office if participating in the Group Tax Exemption.
- Summer is typically a slow time for SUNA chapters---Don't lose your momentum!!
- uroLogic Conference is in the fall and the Advanced uroLogic is in the spring - contemplate "raffling" off complementary registration for one of your members
- Help find nominees for chapter officer positions (contemplate having 2-year terms for your officers: President Elect becomes President during his/her second year. Secretary, Treasurer - alternate years when these positions "rotate off". Need to fill President Elect position and other officer positions as needed)
- Assist President Elect with elections for chapter officer positions - Voting deadline **-TBD by individual chapters ~**
- Follow your chapter work plan, review and update at each meeting
- Recruit chapter members to help with chapter activities - be on the lookout for future leaders
- Balance work and fun! Plan informal get together to exchange ideas

Things to remember

- The year goes by FAST!! Don't let it slip by.
- Create a calendar system to help you keep on track.
- Utilize all the SUNA tools...need something or have a question? There is most likely a tool created to help you and there is always the SUNA National office to help.
- Business meetings do not have to be super formal...do you work with fellow officers? If you discuss chapter business during a break in the action this can be counted as a business meeting.
- Education meetings do not have to be full day events. SUNA has many free CNE opportunities.
 - Set a time period in which you ask your members to watch the free on-line CNE then schedule a follow up conference call to discuss the content -as long as you have 3 or more members on the call this can count as a chapter education meeting
 - Have a follow up conference call with your chapter members after a webinar (offer to reimburse the members the \$5 fee if they attend the call) to discuss the webinar content -as long as you have 3 or more members on the call this can count as a chapter education meeting
 - Meet at a member's home, restaurant, meeting room...and watch the free monthly CNE or webinar together and discuss the content -as long as you have 3 or more members at the meeting this can count as a chapter education meeting

- Discuss a journal article with your co-workers at work during a break in action - as long as you have 3 or more members discussing the article together this can count as a chapter education meeting
- Begin orienting the incoming treasurer
- If you are struggling to meet your volunteer responsibilities contact your fellow officers and assigned Director-at-Large (DAL) - we are here to help you SUCCEED!!