

Curriculum Guide for Presentation on:

***The Role and Function of a Treasurer, and
Building an Officer Team***

Goal: To understand the role and function of a treasurer in a Seventh-day Adventist organization, and how the treasurer can help to build an effective team and relationship with the other officers of the organization.

Points to cover:

1. The roles and functions of the treasurer in a Seventh-day Adventist organization are to:
 - a. Serve under the direction of the executive committee.
 - b. Provide leadership, guidance and counsel for plans and decisions regarding financial matters.
 - c. Cultivate a climate of service to the organization, and to the other organizations to which it is related.
 - d. Cultivate an ethical climate in the organization, addressing:
 - Integrity
 - Excellence
 - Fairness
 - e. Recognize that our service is ultimately to God, as well as to the governing body, constituents, and donors.
 - f. Provide accountability and responsible stewardship to the governing board and constituents for holding and using the organization's assets.
 - g. Receive, safeguard and disburse all funds in harmony with the constitution and bylaws, the actions of the governing committee, and church policies.
 - h. Remit all required funds to the Union/Division/GC in harmony with church policies.
 - i. Maintain appropriate legal status of the organization and its properties and maintain compliance with contracts, agreements and government/accrediting agencies.
 - j. Supervise individuals that report to the treasurer and encourage ongoing professional growth.
 - k. Evaluate, assess, summarize, and timely communicate financial data for fellow-officers, governing committees, and constituents.
 - l. Evaluate and manage risks.
 - m. Maintain a records retention system.
 - n. Participate in assuring that employment practices are both just and legal.

2. To help build an effective team with the other officers:
 - a. Review the job descriptions for each officer together.
 - Recognize and respect each other's responsibilities.
 - The review process intentionally distributes responsibilities.
 - This provides opportunity to build a complementary and productive team.
 - Where responsibilities converge, regular communication is vital.
 - b. Build loyalty to each other.
 - Take time to get to know, understand, and respect each other.
 - Be inclusive of all team members, as appropriate.
 - Protect confidentiality.
 - Encourage and support one another.
 - Avoid criticism.
 - c. Communicate regularly and often.
 - When the officers understand the issues that each are dealing with they can provide better support and counsel.
 - When the other officers understand the budget and the budgeting process they can more wisely know what funding is planned and available.
 - When the other officers understand the financial statements they can be supportive of funding opportunities and the need to control spending.
 - Good communication helps the team protect you from criticism of your decisions.
 - d. Differences of ideas and viewpoints are valuable--without differences a team wouldn't be needed.
 - First, communicate your viewpoints within the team.
 - State your viewpoint and tell how you came to this opinion.
 - Listen carefully and respectfully to others' opinions.
 - When it is appropriate, inform the governing committee that the officer team may have varied viewpoints.
 - The officers may each be given opportunity to respectfully state their viewpoints.
 - Avoid criticism of the other officers' viewpoints.