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.