

Secretary/Treasurer

The Secretary/Treasurer oversees the areas of correspondence and finance.

Election & Term of Service

Election: Elected by the membership; occurring in even numbered years

Term: 2 years (May serve for two consecutive terms for a total of 4 years)

Responsibilities begin May 1 of the appropriate year and run until April 30. New officers attend the Board meeting held in conjunction with the annual conference prior to beginning their term of office for transition and orientation.

Responsibilities and Duties

- Serves on the Board of Directors and carries out Board responsibilities.
- Chairs the [Finance Committee](#)
- Oversees the recording of minutes and notes of all convened Board meetings and the Annual Meeting ensuring minutes are submitted in a timely manner for the Board's approval and amendments as noted.
- Oversees the development of the annual calendar for dissemination on the Website and in the Policies and Procedures Manual.
- Prepares the annual budget in concert with the Finance Committee (Past-President, President-Elect, and the Executive Director) for presentation to the Board.
- Presents a Financial Report at the Annual Conference business meeting
- Presents the Annual Financial Report in the IDEC Annual Report
- Serves as overseer of IDEC accounts and arranges for audit of the IDEC records and transactions by a CPA at three to five-year intervals or as deemed appropriate.
- Maintains and updates the Policy and Procedures Manual to conform to Board approved policies and procedures and submits revisions to IDEC Headquarters for publication on the website in a timely manner.

Programs, Events, & Committees

- Finance Committee
 - IDEC Budget
 - Financial Report at Annual Conference
 - Financial Report in IDEC Annual Report
- Policy and Procedures Manual
 - Maintenance and updates
- Board Minutes
 - Record of Monthly Board Meetings
 - Record of Annual Board Meeting
- Annual Calendar

Timeline

- **Monthly** conference call with Board of Directors

- **May** – initial draft budget to Treasure from Executive Director; treasure reviews and analyzes; returns revisions back to Executive Director
- **May/June** – Prepare draft budget with Executive Director for next fiscal year (before summer Board of Director (BOD) meeting)
- **June** – [Finance Committee](#) reviews revised budget; makes revisions as necessary; submits to BOD
- **July** – Quarterly financial reports due to Secretary/Treasurer and Finance Committee from Executive Director
- **July** – BOD Retreat
- **August** – Annual Budget finalized by Finance Committee for approval by BOD in September
- **September** – Send out RFP for initiative funding if additional funds are available
- **October 30** – Yearly financial reports sent to Secretary/Treasurer and Finance Committee from Executive Director
- **January** - Quarterly financial reports due to Secretary/Treasurer and Finance Committee from Executive Director
- **January** – Deadline for Annual Dues; Follow-up with [Regional Chairs](#), [Membership Chair](#), and [Director of Regions](#) on non-renewals
- **January 1 – November 1** – Dues received during this time incur a \$35 late fee
- **February 15** – Membership of those who have not paid dues is terminated
- **April** - Quarterly financial reports due to Secretary/Treasurer and Finance Committee from Executive Director