

SECRETARY/TREASURER

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

Election & Term of Service

Election: Elected by the membership.

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

Responsibilities begin May 1 and conclude 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 as outlined in the Elected Leaders Responsibilities section of this document.
- Serves as chair of the Finance Committee
- Oversees the recording of minutes and notes of all convened Board meetings.
- Oversees the recording of minutes and notes of the Annual Meeting.
- Oversees the development of the annual calendar in collaboration with IDEC Board and management staff
- Prepares the annual budget in collaboration with the Finance Committee and management staff.
- Presents the Summary Financial Report at the Annual Conference business meeting to the membership in collaboration with IDEC Board and management staff.
- Prepares the annual report in collaboration with IDEC Board and management staff.
- Oversees IDEC accounts and annual financial reviews in collaboration with management staff as outlined in the Financial Policies section of this document.
- Maintains and updates the Policy and Procedures Manual in consultation with the IDEC Board.
- Completes financial training in collaboration with management staff within 2 months of starting the role as Secretary-Treasurer.
- Engages with new IDEC Board members during their on-boarding process to orient them to IDEC financial processes.

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
- **Monthly** conference call with Finance Committee
- **Monthly** – Review of financial reports from Executive Director
- **Jan** – Begin the [Annual Report](#).
- **Mar** – Board meeting at Annual Conference
- **Mar-April** – Finalize Annual Report & distribute to Membership
- **May-July** – Prepare budget in consultation with Executive Director and Finance Committee
 - **Summer** – Board meeting
- **August** – Annual Budget finalized by Finance Committee for approval by Board in September
 - **October 30** – Review annual financial reports sent to Secretary/Treasurer and Finance Committee from Executive Director