

Chapter Treasurer: Role Expectations

Starting the ANNA year on the right foot
(ANNA year is January 1st to December 31st)

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, submitting chapter financial reports and dispensing chapter funds. This is a quick guide to help keep you and your chapter on track for a successful ANNA year!

Legend: *Required for Re-charter* -Due Dates- +Optional for STAR Points+

January and February:

Outgoing Treasurer

- Attend the ANNA year's first *Business Meeting* with the outgoing and incoming chapter officers (may be face to face or via conference call)
 - At this meeting:
 - Provide the chapter financial report
 - Watch the +Chapter Work Plan Fast 15+
 - Help develop the initial chapter work plan (include goals for fundraising)
 - Assist with the plan on how to get all chapter officers to the Volunteer Leaders' Workshop (VLW)
- Submit the *Calendar year end financial report* by **January 15** (NOTE: This is the first of two financial reports due every year)
- Review Chapter Activity Report - if meetings, credit for *Update* Articles, etc. are missing contact the National Office and your assigned ANNA Chapter Support Team (ACST) liaison.
- Review the entered STAR points and enter any missing ones
- Begin orienting the incoming treasurer

Incoming Treasurer

- Complete the +Officer Orientation Fast 15's+
- Help complete chapter supply checklist

March and April

- Finalize plans to attend the VLW.
- Help finalize **+Work Plan+**
- Attend business meetings PRN and provide financial report
- Incoming officers “officially” take over their officer roles after the National Symposium
- After the National Symposium obtain chapter records from the outgoing treasurer
- Get signatory privileges on all chapter accounts
- Familiarize yourself with the “Chapter Officers Only” section on the ANNA web site
- Outgoing Treasurer - Submit the *Fiscal Year End Financial Report* by **April 15** (NOTE: This is the second and final financial report due for the year....if it is not submitted by JUNE1 your chapter will be responsible to the IRS for taxes.)
- Watch the **+Chapter Finances Fast 15+**
- Review “Chapter Finances” of the chapter officers only section
- Review Chapter Activity Report - if meetings, credit for *Update* Articles, etc. are missing contact the National Office and your assigned ACST liaison.
- Review the entered STAR points and enter any missing ones

May and June

- Obtain any expense reimbursement forms from the members who have attended the National Symposium or officers that attended the Volunteer Leadership Workshop and reimburse PRN.
- You are half way through the ANNA year...Assure that at least one ***Education Meeting*** has been completed. To make re-charter must provide 2 educational meetings (one must supply CNE's). Work with the President Elect by writing checks out of the chapter account for expenses.
- Help plan activities for Nephrology Nurses' week (NNW) and selecting NNW products - see ANNA web site under *Education/Nephrology Nurses Week*
- Assist Health Policy Representative (HPR) with Kidney Disease Awareness and Education Week (KDAE) activities.
- Review Chapter Activity Report - if meetings, credit for *Update* Articles, etc. are missing contact the National Office and your assigned ACST liaison.
- Review the entered STAR points and enter any missing ones

July and August

- Summer is typically a slow time for ANNA chapters---Don't lose your momentum!!
- July 4th - Send out a “Happy 4th of July” message to your members
- Remind members that applications for national positions are due **~August 15th~**
- **~Second week of August~** Assist the Health Policy Representative (HPR) by hosting a KDAE week activity and assure the HPR has submitted the on line KDAE report
- Help finalize plans to celebrate NNW
- Review Chapter Activity Report - if meetings, credit for *Update* Articles, etc. are missing contact the National Office and your assigned ACST liaison.
- Review the entered STAR points and enter any missing ones
- **Are you struggling...life has gotten in the way of your ANNA chapter officer duties?? DO NOT LET YOUR CHAPTER GO DOWN IN FLAMES! Contact your fellow officers and ACST liaison ASAP and send out a SOS to your members!!**

September and October

- Haven't had an educational meeting yet...UH OH!! Talk to the President Elect about using the Fall Webinar as an educational meeting.
- **~Third week of September~** Celebrate NNW
- Remind members Awards and Scholarship applications/nominations are due **~October 15th ~**
- Remind members Nurse in Washington Internship Scholarships (NIWI) applications are due **~November 15th~**
- Fall meeting is in October - contemplate "raffling" off complementary registration for one of your members
- Review Chapter Activity Report - if meetings, credit for *Update* Articles, etc. are missing contact the National Office and your assigned ACST liaison.
- Review the entered STAR points and enter any missing ones

November and December

- Your year is almost over...Finish STRONG!!
- Nurse in Washington Internship Scholarships (NIWI) applications are due **~November 15th~**
- 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 and HPR - 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 **~January 1st ~**
- Review the entered STAR points and enter any missing ones - final date to enter STAR points for the current year (January 1 to December 31) is **~December 31st~**
- Has your chapter completed the re-charter criteria?? If "Yes"...CELEBRATE your success!
- Review Chapter Activity Report - if meetings, credit for *Update* Articles, etc. are missing contact the National Office and your assigned ACST liaison.

Ongoing Responsibilities:

- 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
- Maintain contact with your assigned ACST liaison.

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 ANNA tools...need something or have a question? There is most likely a tool created to help you and there is always the ANNA Chapter Support Team (ACST) and 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. ANNA 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
- If you are struggling to meet your volunteer responsibilities contact your fellow officers and assigned ACST member - we are here to help you SUCCEED!!