



ANNA
American Nephrology
Nurses Association

Policy	11.01.18
Revised	12/23
BOD Reviewed and Approved...	2/24
DEI Reviewed.....	2023-24
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ROLE DESCRIPTION

NOTE: This position may be held by two (2) individuals or combined and held by a single individual, depending on the chapter's needs. For this reason, the distinct duties of each separate office are designated in this role description.

A. ROLE TITLE: CHAPTER TREASURER

B. OVERALL PURPOSE AND OBJECTIVES OF ROLE

1. Understands, upholds, and supports ANNA's mission, vision objectives, purpose, objectives, policies, procedures, and strategic plan.
2. Supervises and maintains all official financial records.
3. Supervises treasury and submits chapter financial reports as requested meeting all deadlines (Chapter Treasurer).

C. COMPOSITION

1. Officer
 - a. Selection Method: Elected by local ANNA members.
 - b. Qualifications: Full member of ANNA.
 - c. Selection criteria:
 - (1) Active in local chapter.
 - (2) Has a working knowledge of the mission, goals, and objectives of ANNA.
 - (3) Actively involved in nephrology related health care services.
 - (4) Has or obtains computer skills and access to a computer and the Internet.

D. TENURE

Elected for a one (1) year term (on the ANNA national election cycle), unless otherwise specified in Chapter Bylaws.

E. GOVERNED BY NATIONAL AND MODEL CHAPTER BYLAWS

F. ATTENDANCE EXPECTED AT THE FOLLOWING MEETINGS:

1. All local ANNA chapter educational and business meetings.
2. All local Chapter Executive Committee meetings.
3. Encouraged to attend all nationally sponsored meetings held in the chapter area.
4. Encouraged to attend ANNA National Symposium.
5. Encouraged to attend the Leadership Development And Education (LEAD) Workshop (incoming officer), held prior to the National Symposium.

G. RESPONSIBILITIES OF OFFICER

1. Understands, upholds, and supports the mission, vision, objectives, policies, procedures, and strategic plan of ANNA.
 - a. Serves as a member of the Chapter Executive Committee.
 - b. Solicits input from all chapter officers and reviews financial history of chapter to prepare annual chapter budget.
 - c. Maintains and keeps bank account records up-to-date.
 - d. Reviews Role Description as requested and proposes any changes to the Chapter President.
 - e. Reviews policies and procedures pertinent to the office as requested and proposes any changes to the Chapter President.
 - f. As a member of the Chapter Executive Committee, contributes to the development of the chapter work plan.
 - g. Assumes responsibilities as delegated by the Chapter President.
 - h. Orients successor to the role.

2. Completes officer orientation module as directed by the National Office.
3. Supervises treasury.
 - a. Maintains financial records of the chapter (copies of bank statements, checks, etc.) for seven (7) years in a manner that facilitates required tax reporting.
 - b. Prepares and presents financial reports for each chapter business meeting.
 - c. Prepares and signs checks as approved by Chapter President.
 - d. Submits chapter financial reports per Policy & Procedure 6.13, *Chapters: Financial Reporting*, by requested deadlines.
 - e. Immediately communicates concerns and questions regarding financial reporting to Chapter President, ANNA Chapter Support Team (ACST), and National Treasurer.
 - f. Maintains chapter copy of the financial report.
 - g. Submits additional information as requested by ACST, National Treasurer, or National Office.
 - h. Assumes other financial responsibilities as delegated by the Chapter President or Chapter Executive Committee.
 - i. Establishes a minimum of two (2) signatories for each chapter account.
 - j. In the case of chapter dissolution, assures that all financial statements and accounts are returned to ANNA. This includes closing accounts and sending remaining money to the National Office, per Policy & Procedure 6.18, *Dissolution of Defunct Chapter*.
4. Utilizes ANNA Connected to network and collaborate with ANNA members.

H. RESPONSIBILITIES OF MANAGEMENT FIRM

1. Serves as a resource for the chapter.
2. Facilitates financial reporting per Policy & Procedure 6.13, *Chapters: Financial Reporting*.
3. Coordinates compilation of financial reports and sends to the designated accountant. Notifies the Chapter Treasurer if financial reports are not received.
4. Submits report forms to Chapter Treasurer for submission at calendar year-end and fiscal year-end reports.

I. LINES OF COMMUNICATION

Refer to the organizational chart.