

BC/Yukon Area Treasurer

Job Description

As a Member of the Area Officers

The BC/Yukon Area officers include the Delegate, Alternate Delegate, Area Chair, Secretary and Treasurer. Each officer is elected by the Group Representatives who vote on behalf of the groups in the Area. Area Officers work together to handle the day-to-day requirements of supporting the membership.

As a Member of Area World Service Committee

The Area World Service Committee is comprised of Area Officers, Area Coordinators, Al-Anon Information Service/Literature Depot liaisons and District Representatives. The purpose of this committee is to plan for the general improvement of both the Assembly and the groups. The AWSC members meet between Assemblies to initiate projects, make recommendations to Assembly and plan the agenda for Assembly.

Area Officer General Responsibilities

Area Officers work together to facilitate communication within the Area and between the Area and WSO. Officers also handle the practical functions of the Area such as banking, recording, and arranging AWSCM and Assembly. Each officer is responsible for supporting the Area service members to effectively carry out their duties to support the unity and growth of Al-Anon in BC/Yukon Area. Officers may also work together with members to initiate activities to improve services to members.

When elections are scheduled, interested applicants must submit a service resume to the BC/Yukon Area Chair. The resume may be posted in the BC/Yukon Area Bulletin prior to Assembly. Resumes are reviewed by the members and Officers are elected by Group Representatives at Assembly for a 3-year term. The applicant may be asked to address the GR's at Assembly before the vote is taken.

General Qualifications

- An active member of Al-Anon who attends meetings on a regular basis and not also a member of Alcoholics Anonymous (Pg 86-87 *Al-Anon/Alateen Service Manual 2022-2025 v2 edition*)
- Must be a District Representative completing their third year of the term or an active past District Representative who has completed a 3-year term (*2019 Motion*)
- Able to attend AWSCM in May, Assembly in September and Officer/Coordinator meeting in January or February. (Up to one extra officer/coordinator meeting may be scheduled if required). Able to attend in person or online as required.
- Able to communicate effectively in English both verbally and in written form
- Familiar with Traditions and Concepts
- Familiar with Area and World Service structure
- Familiar with active Motions adopted by the Area Assembly
- Willing to work cooperatively with members of the Area World Service Committee
- Internet and computer skills including MS Word and Excel
- Proficient use of e-mail is necessary
- Able to lead by example (see leadership essay on page 199, *Al-Anon/Alateen Service Manual*)
- Able to effectively use the *Al-Anon/Alateen Service Manual* for reference

Purpose of the Treasurer:

“The Treasurer handles all Assembly collections and funds.” (Pg. 149 *Al-Anon/Alateen Service Manual*)

- Responsible for the accurate and transparent accounting of all BC/Yukon Area financial records, expenditures and contributions. Presents reports at AWSCM and Assembly. With input from Officers, Coordinators and finance committee, helps create a budget that is presented and approved at Assembly. Organizes and retains all financial records which may be destroyed after 5 years.

Specific Experience/Skills Required:

- Good computer literacy skills, including Excel, Word, PowerPoint & QuickBooks or willing to learn
- An understanding of general booking principles
- Good written and verbal communication skills
- Ability to function as a member of a team

Primary Duties:

- Record and deposit incoming contributions accurately (cheque, cash & e-transfer)
- Review, record and pay expenses submitted by Officers, Coordinators and AIS Liaisons
- Pay expenses for general operations as needed (eg website, archive rent)
- Manage financial records and store in secure manner (can be destroyed after 5 years)
- Compile a financial report to present to members prior to AWSCM and Assembly (cutoff dates February 28th and June 30th respectively)
- Present a report of financial situation to members at AWSCM and Assembly including 5-year cost comparisons for AWSCM and Assembly
- Consider/approve applications for subsidy from DRs and Grs to travel to AWSCM or Assembly
- Manage bank account (CIBC) for changing signatories as needed (usually each January)
- Reconcile bank account
- Monitor GIC accounts and record interest annually
- With input from Officers and Coordinators, create an annual budget to present at Assembly for approval and vote.
- Submit reports & financial guidelines to Bulletin
- Respond to member’s inquiries as needed

Communication:**With Area**

- Regular communication with Area Officers by email, phone or zoom
- Consider feedback from members after each meeting & determine action, if needed
- When necessary, prepare and send out appeal letter for donations, via the Area Bulletin

With Districts

- Respond to requests for financial information

With Groups

- Communicates information monthly via BC/Yukon Area Bulletin
- Responds to request for financial information

With WSO

- Monitor AFG Connects community for Area Treasurers

Time commitment: 2-3 hours/month plus prep, travel, attendance & wrap-up for 3 weekend meetings

Monthly: 2-3 hours per month

- Deposit cheques and e-transfer contributions using online banking
- Mail or email receipts if requested
- Write cheques for any expenses
- Reconcile bank account
- Respond to emails and phone calls as needed
- Write report for Bulletin each month

Meeting: Officer/Coordinator Jan/Feb: prep 2 hours & travel/attendance 1 weekend

- Prepare report along with current financial statements
- Pay expenses for rent & Officer/Coordinator/Liaison expenses

Meetings: AWSCM in May & Assembly in September: 4 hours prep & travel/attendance Friday afternoon until Sunday noon.

- Prepare current financial statements for DR handouts, prepare presentation for AWSCM meeting.
- Assist Officers as needed to prepare for meeting
- Attend Officer/Coordinator meeting Friday afternoon & Meeting Friday night and all day Saturday
- Present Treasurer's report Saturday morning. (for Assembly only, present proposed budget)
- Pay expenses for Hall rent, and Officer & Coordinator expenses
- Collect Tradition 7 during meeting on Saturday afternoon
- During week afterward, record contributions and expenses, deposit contributions & write cheques for expenses including Officers/Coordinators, hall rental etc.

Year End June 30th: 4-5 hours

- Create list of contributions from group by district and send each District Representative the list for their district so groups can check to ensure our records are accurate
- Close off year end accounts in QuickBooks & collect all supporting documents for filing
- Consult with Officers & Coordinators (finance committee) to create budget and present for approval at Assembly (2-3 hours)

Length of term: Three years