



## Chapter Leader Position Description: Vice President of Finance

### Position Summary:

The vice president of finance manages the operational finances of the chapter. He/She coordinates the budget and operational issues with other board members, as well as administrative services. He/She assures that chapter operations are in compliance with ATD's Chapter Affiliation Requirements (CARE).

### Time Commitment:

**Term:** One year (Renewable annually by vote of Board of Directors)

#### Estimated Time Requirements per month:

- Attend board meetings: 2 hours plus travel time
- Conduct internal Audit with committee: 8 hours plus travel time (one-time annually)
- Attend monthly chapter meetings: 3 hours plus travel time
- Communicate with administrative office about routine issues: 2-4 hours
- Record keeping and financial book upkeep: 2-4 hours

### Responsibilities:

#### Budgeting

- Creates an annual operating budget and makes it accessible to members

#### Conducts Audits

- Audits income/expenses and cash-flow on a monthly basis to ensure chapter's sound financial status
- Reports the results of financial audits to the board in a timely manner

#### Compliance

- Ensures compliance with CARE
- Ensures chapter is in compliance with state and federal reporting requirements

#### Finance/Operations

- Oversees operations and finance for the chapter
- Reconciles chapter bank accounts on a regular basis
- Oversees the accuracy of record-keeping and reporting
- Issues payment for invoices in a timely manner
- Maintains chapter tax-exempt non-profit status
- Ensures that the chapter maintains adequate insurance coverage

#### Training

- Trains incoming Vice President of Finance
- Trains volunteers to support audit functions

**Board Participation**

- Reports all income and expenses to the board on a regular basis
- Reports on financial status of chapter each January at membership meeting and each month at board meetings
- Attends and participates in all monthly board meetings and chapter programs
- Participates in other chapter events, committee meetings, and conferences as available
- Represents chapter professionally and ethically in all business functions/organizational activities
- Participates in the ATD International Conference and Exposition and ATD Chapter Leaders Conference (ALC)

**Qualifications:**

- Member of ATD National and Smoky Mountain Chapter
- Demonstrated experience in budget design, fiscal responsibility and accounting practices
- Good understanding of operations and finance
- Ability to work with administrative services
- Time available to fully participate in chapter and board meetings, and represent the chapter regionally and nationally

**ATD Resources:**

[Chapter Relations Manager \(CRM\)](#)

[National Advisors for Chapters \(NAC\)](#)

[Chapter Affiliation Requirements \(CARE\)](#)

[Sharing Our Success \(SOS\)](#)

[Chapter Leader Community \(CLC\)](#)

[Leadership Connection Newsletter \(LCN\)](#)

[Toolkits](#)

[Chapter Leader Webcasts](#)