¡Milwaukee Evaluation!

PIPELINE FOR EVALUATORS OF COLOR & OTHER UNDERREPRESENTED GROUPS

AEA AFFILIATE

Treasurer Board Position

Overview

¡Milwaukee Evaluation! Inc., a statewide affiliate of the national American Evaluation Association, is looking for an individual to join its volunteer board and serve as *Treasurer*. The Treasurer responsibilities are listed below. If interested, please contact Nicole Robinson, Board President, at 414-232-9687 or milwaukeeevaluation@gmail.com.

Treasurer Responsibilities*

- Provide reports/summaries of the financial health of the organization
- Oversee bank account and financial transactions
- Prepare and submit annual budget for board approval
- Lead the development and maintenance of specific policies and practices that nurture the organization's fiscal health
- Serve as Chair of Finance/Fundraising Committee

*See next page for more detailed description.

Board Terms and Participation

¡Milwaukee Evaluation! Inc. board members serve a 2-year terms and are eligible for re-appointment. Board meetings are monthly, quarterly, and/or as needed.

Qualifications

- **Task-Management** to oversee multiple tasks for different projects simultaneously.
- **Customer service** to organization's members, addressing people's questions regarding membership, payments, and tax documents.
- **Computer skills** to operate Microsoft Office Suite (specifically Excel, Word), Google Drive, and online bank accounts.
- **Arithmetic** to calculate organization's budgets.
- **Critical thinking** to help organization with strategic planning.
- **Demonstrate a high-level of experience in collaborative leadership and equitable decision making with diverse populations** such as LGBT, African American, Native American, Hispanic/Latino(a), Asian American, multi-racial populations, youth and/or rural groups.
- **Alignment with ¡Milwaukee Evaluation! Inc. values, shared leadership model, collaborative work style, and organizational goals.** Your values must be obvious in your professional portfolio.
- **Have on average 2-4 hours a month to work on ¡Milwaukee Evaluation! Inc. activities.** Number of hours will vary depending on organization's events and needs. Since this is a new group, we have a hands-on, working board where Board members are expected to carry out board-related activities between meetings and conference calls.
- **Agree and adhere to sign the Board Member Agreement and bylaws.**

Selection Process

Interested individuals should send a letter of interest and resume or CV to milwaukeeevaluation@gmail.com. Candidates will meet first with the Board President and then with the full board. The full board along with the applicant will mutually agree on whether the individual should join the board.

***Detailed Description of Treasurer Responsibilities**

Financial management and/or oversight. Manage the financial affairs of the organization, often such as reconciling bank statements, manage cash flows from PayPal, Wild Apricot (organization website), physical checks. In addition, the development of financial policy for event pricing, membership dues, and sponsorships will be an ongoing process.

Budgets. Responsible for preparing organizational budget with projected yearly costs, as well as regularly monitoring and comparing the actual revenues and expenses incurred against the projected budget. Budget is developed in conjunction with other board members legacy projects and events. As such, an integral understanding of the organization's goals and objectives is important. The budget will be reviewed by the board, with thorough explanations documented and readily available for each item.

Reports. Preparing reports of the organization's financial state will occur monthly, to align with the organization's board meetings. The reports will serve to continuously compare the projected budget with actual revenues and transactions, providing board members with interpretations, trends, and any possible concerns concerning the fiscal health of the organization.

Financial Liaison. Responsible for the completion of financial documents for state and federal processes, such as IRS tax forms, states fees, etc. Constant communication with the organization's accountant is essential. Customer service skills are also necessary for interacting with the organization's members, usually around membership dues and registration for special events.

Overall. The Treasurer can be most effective to the board when facilitating and encouraging the board's strategic thinking about the short- and long-term financial vitality of the organization in relation to the organization's mission.