

Ebony Nurses Association of Tacoma Financial Secretary Transition

OBJECTIVE:

Provide a resource to the organization members who are moving in/out of leadership roles to ensure that efficient and effective transfer of knowledge/information occurs.

1. RESPONSIBILITIES:

- a. Participate in group Executive Committee meeting with outgoing President by Jul 30.
- b. After the President submits the documents, go to bank and add your name to the account. And receive bank card to access the account. Ensure online access with password from the President.
- c. Financial Secretary shall maintain records of dues and payments received.
- d. Give all collected monies to the Treasurer for deposit within 7 days.
- e. An Itemized ledger of all financial transactions will be maintained; and a list of all paid members will be kept.
- f. Assist Treasurer with the Annual financial report

2. Responsibilities:

- a. Serves as back up to the Treasurer
- b. Participate in area training and conference calls as appropriate
- c. Other duties as assigned by organization President or Executive Board

3. Process (How &when)

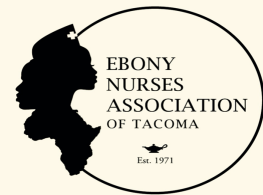
- a. Check Mailbox every 2 weeks or as needed
2602 S. 38th St #124
Tacoma, WA 98409
- b. Distribute mail you received from mailbox to members as needed.
- c. Provide a complete Roster of Voting/paid members to President, Vice president, and Secretary. Keep a Log and provide a receipt to each member when dues are received (Sept-Nov).

4. Key Contacts:

- a. Previous Financial Secretary, Treasurer and other members as needed

5. BEST PRACTICES/LESSONS LEARNED:

- a. Share tools (spreadsheets, templates) other resources that have helped you



- b. Handle your responsibilities more efficiently
- c. Grow your knowledge, network and confidence in your leadership role

6. UNIQUE CONSIDERATIONS:

- a. Describe unique transition issues (Bank cards)
- b. Collaboration with president after receiving from him/her your username and password, go to the bank to activate account, get Band card and PIN#.
- c. Possession of the Keys to Mailbox are held by 2 members (treasurer and another officer or designee)
- d. Mailbox renewal will be in mailbox, provide to Treasurer for Payment

7. Need to Know information:

- a. BECU Contact: University Place Neighborhood Financial Center

3929 Bridgeport Way west

University Place, WA 98466

- b. Email Address: Enaot253@outlook.com
- c. All Bank statements go to Email address for viewing/printing
- d. Checking account is Operational account
- e. Saving account is scholarship account, when sending funds to colleges remember to transfer funds from saving account to checking to pay/cover the check provided for the award.
- f. Officers Should not be absent more than 2 consecutive meeting without legitimate excuse
- g. Web Master : odiscrosby08@gmail.com
253 312-5787
- 8. Onboard the new Financial Secretary.
 - a. At the end of your term, turn over all files/information (logins, passwords, keys etc) to the new Financial Secretary by July 1.

Signature of Transitioning/Boarding members

Date