



# **OMUG TREASURER AND MEMBERSHIP COORDINATOR TASKS & RESPONSIBILITIES**

**Member of OMUG Board of Directors (BOD)**

**OMUG Treasurer**

**OMUG Membership Coordinator**

Don Boyd, Feb 20, 2017



## **Member of OMUG Board of Directors (BOD)**

### *Responsibilities -*

Attend Meetings when called

Keep Board members appraised of financial problems

Proof read monthly newsletter - MUGSHOTS

Other Duties as Assigned

# OMUG Treasurer

## *Responsibilities -*

Maintain Checks, Deposits & Check Register

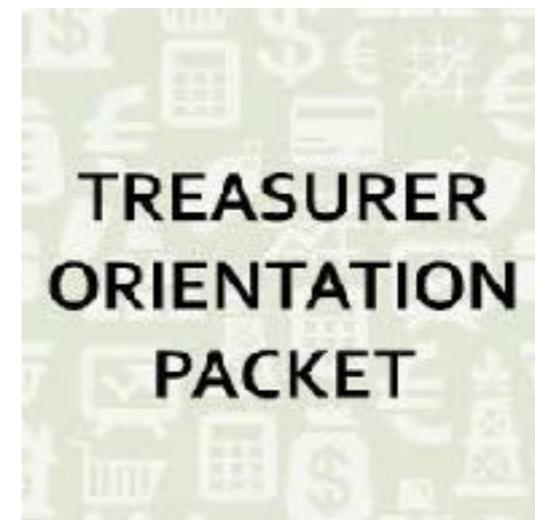
Develop and present Monthly Financial Reports

Collect & deposit Annual Dues & other collections

Pay and hold Annual Liability Insurance

Develop and track Annual Budget Estimate

Other duties as Assigned



## Membership Coordinator

### *Responsibilities -*



Maintain Membership Combined Master & Attendance Lists

Prepare and maintain members badges.

Prepare and maintain Meeting Sign-In sheets.

Prepare various correspondence to members

Assist the public and members with membership questions

Other Duties Happen!



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## TALKING PAPER 1 - SUMMARY

Good Afternoon

Our President has asked me to try to convince one of you awesome members to consider volunteering for my job as OMUG Treasurer and Membership Coordinator.

It seems I've over extended myself this year in my community Veterans Club and wish to concentrate extra time helping them. My 3 years in this position has taught me much, involved me with outstanding people and given me many great memories. I will continue as a member of OMUG and will assist as needed.

This job is not really that difficult or time consuming, it's like maintaining your own home checkbook and writing personal letters to friends.

Like any job you can put into it just the basics or like me try to over achieve and keep thinking of new things, I think Phil will back me here!

What you see are the 3 parts of my job, which I will go into with a short description of the responsibilities.

## TALKING PAPER 2 - BOD

This is the easy part, I believe we've had 3 or 4 meetings since last May.

Problems are problems and they happen, but during my 3 years little has occurred to create any panic, if you don't count the move from the Senior Services Center! I'd say the biggest problem was coming up with a budget, and so far we're still in the **black!**

Al Sypher puts out a near flawless rough MUGSHOT monthly and challenges each Board member to find an error, not to easy!

We've all seen this one, "Other Duties As Assigned" Ugh! It's a catch-all and in most cases, like last year we all worked on extras like the "Bylaws", Phil's Handbook, the move and other group tasks.

## TALKING PAPER 3 - TREASURER

I maintain the register in Numbers, it dates back to January 2014 and runs up to date. Since it is money I don't share it with anyone unless there's an audit or one of the BOD requests to review it. I also keep an envelop for the receipts by FY year.

The Monthly Reports I keep in Keynote and each month update for the meetings, These are based on the monthly statements I download from the bank.

Normally in March I put a note in MUGSHOT about dues, then again in April when I collect. Other collections can be anything, like Phil bought an Amp the OMUG owned.

We are coming up on our 3rd year with Liability Insurance. when it's due the Agent will sent me notice (September).

In February I usually start working the budget and will ask the Board members what there estimates are for the next year. It's an easy process and I keep this form on the OMUG Google Drive.

I also keep reminders of events in the OMUG Google Calendar, i.e. Liability Insurance, upcoming dues reminders, etc. helps to turn on the alert!

Here's that Other Duties thing again - anything can happen and if you're not sure how to handle it the Board is there - I usually start with Phil, he's got the corporate knowledge.

Note - The OMUG Google Drive has a wealth of information and has just about all my documents (samples). It takes a little getting use to but there's good on-line instruction (and Phil's got most of the answers) very worth knowing.

## TALKING PAPER 4 - MEMBERSHIP COORDINATOR

This form keeps track of each members, name, address, phone, eMail, when they paid & check # status, etc. and is used to account for who attends the meetings for reports and questions during the fiscal year. It is shared with all the Board members on the GDrive.

I prepare the FY badges once a year and when new members join. Each month they are passed out & collected at the meetings when attendees Sign-In. It helps in tracking, when everyone them turns-in.

The sign-in sheets basically duplicates the Combined Master List and I have tied it into the combined list above so it's an all in one place. All you do is change the date, make any member changes and print for that month's meeting.

Most of the correspondence here is for when there's a new or renewed member, at the beginning of the FY and at the end. Also we like to ask those who didn't renew, why to see if we can improve our program. Copies are on the GDrive and I usually personalize depending on the need.

Assisting people is what we are all about and if you can't answer a question one of the listed members can.

The Google Drive is one of the main tools for finding OMUG things to be done or have been done in the past. I'm a fairly trusting person, HOWEVER, when it comes to others money I still like to keep things close (the Bank Register), therefore, I don't keep it on the GDrive but I keep a duplicate copy on a thumb drive, which comes with the job.

Yes It Happens just remember the Board's got your back.

## TALKING PAPER 5 - QUESTIONS

### ***Oh, and one last thing.....***

The basic APPS you'll use are Pages, Numbers, Keynote and Google Drive Documents (**almost** identical to Pages & Numbers) and the OMUG Google Calendar.

I'm not leaving OMUG! Your first year starting in May should be easy to slip into as I'll be your coach; I'll have collected most of next FY dues; the BOD will have set the new budget; I'll have made the new FY badges; I'll have updated the Combined lists; and hopefully cleaned-up my paperwork so it's understandable and easy to use. A husband and wife team would really make this job easy!

Any Questions?

OK, Hand in your resume to our Lovely Secretary, Lorraine!