

SASKPIC A Chapter of Infection Prevention and Control (IPAC) Canada



Section: Job Descriptions	Approved: April 11, 2018
Title: Treasurer/Membership Director	Revised: March 3, 2020
Number: SP 2.5	President: Karrie Yausie

Purpose

To oversee the management and reporting of the chapter's finances and to maintain an accurate record of chapter members and contact information.

Policy

1. The Treasurer/ Membership Director ensures accurate financial records and preservation of the chapter funds.
2. The Treasurer/ Membership Director follows IPAC Canada Policies and Procedures.
3. The Treasurer/ Membership Director assures retention of all financial records of the chapter for seven (7) years.
4. The Treasurer /Membership Director maintains a current membership list.
5. The Treasurer/ Membership Director maintains an awareness of possible candidates for Executive positions.

Term

The term of this position is three (3) calendar years. A second 2 year term may be served at the discretion of the SASKPIC membership.

Eligibility Criteria

Candidates for Treasurer/ Membership Director must be in good standing of IPAC Canada and IPAC -SASKPIC and agree to fulfill the functions of Treasurer/Membership Director as outlined.

Function

1. Acts as the chapter liaison on all financial matters between IPAC Canada and the chapter.
2. Oversees all financial transactions for the chapter.
3. Reports on the chapter's financial situation to the chapter executive and members at each meeting.
4. Maintains all chapter financial records for seven (7) years.
5. Encourages membership in IPAC Canada and the chapter.
6. Receives and compiles membership information as forwarded from IPAC Canada.
7. Maintains a list of current chapter members and updates contact information as needed and sends updated list to Secretary and President as changes occur.
8. Collates a final membership list for the year at the beginning of September and provides a copy to the Secretary for distribution to the membership at the AGM.
9. Acts as the chapter representative to the IPAC Canada Membership Committee.

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10. Attends the annual IPAC Canada Conference with financial support from the chapter every third year (rotating with other members of the executive excluding President, President Elect, Past President and Member At Large) as funds are available.
11. Assures that a welcome document is given to new SASKPIC members.
12. Encourages members to volunteer for Executive positions.
13. Orients the in-coming Treasurer/ Membership Director to ensure a seamless transition.

Procedure

1. Prepares an annual chapter budget and submits it to the Executive for approval at the last meeting of the year September.
2. Deposits all monies to the credit of IPAC -SASKPIC in a bank approved by the Executive.
3. Disburses funds at the direction of the Executive.
4. Maintains complete accounts of all receipts and disbursements.
5. Provides the Executive/membership with a financial update at each meeting.
6. Provides a written transaction report at the end of each calendar year for member review.
7. Makes recommendations to the Executive to ensure financial viability of the chapter.
8. Makes recommendations regarding donation to IPAC Canada or other organizations.
9. Liaises with IPAC Canada Membership Services and Director of Finance to ensure that chapter dues are received, and provides reports as requested.
10. Collates receipts required and submits Refund Report to Revenue Canada.
11. Prepares and sends the annual Financial Statement to the IPAC Canada Director of Finance by January 31.
12. Attends the annual IPAC Canada Finance Committee meeting at the national conference and reports to the chapter. If not attending the conference, brings meeting minutes to the chapter.
13. Refunds chapter fee to Chapter Honorary Members.
14. Acts as/or coordinates with Projects and Projects Coordinator regarding conference planning.
15. Arranges to have the financial records reviewed by an independent trustee annually.

References:

IPAC Canada Policy 2.11, *Board Job Descriptions*: <https://ipac-canada.org/photos/custom/Members/policies/2-11%20-%20Board%20of%20Directors%20-%20TREASURER.pdf>

IPAC Eastern Ontario Job Description Treasurer #2.5: <https://eo.ipac-canada.org/photos/custom/policymanual/2-5%20Treasurer.pdf>

IPAC Eastern Ontario Job Description Membership Director #2.6: <https://eo.ipac-canada.org/photos/custom/policymanual/2-6%20Membership%20Director.pdf>