

# Vice President, Finance and Treasurer

## **Description:**

The VP Finance and Treasurer (VP F&T) is responsible for overseeing and maintaining all Chapter financial documentation and is the Treasurer of Record for the Chapter. Develops and oversees implementation fiscal policies, procedures, and guidelines to align with goals of the Chapter. Provides financial guidance and input on strategy, ensuring programs and endeavors of the Chapter are planned and executed in a financially responsible manner.

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## **Responsibilities:**

- Be accountable for the preparation and accuracy of Chapter financial documents, such as: the books of the Chapter, financial reports, annual budget, and fiscal and financial investment policies of the Chapter.
- Control all Chapter monies in accordance with directives of the Chapter Board of Directors.
- Establish/maintain Chapter bank accounts.
- Ensure all payables and receivables are properly classified and paid according to the Chapter's classification policies.
- Ensure required tax returns are prepared and filed in accordance with governing law.
- Is the Treasurer of Record for the Chapter's Incorporation with the Commonwealth of Massachusetts.
- Provide financial guidance to the Chapter Board.
  - Develop and oversee the creation, implementation, and adherence of comprehensive Financial policies, procedures, and guidelines
- Fulfill fiduciary, ethical, and procedural responsibilities as an elected voting board member
  - Attend board meetings in accordance with the chapter's bylaws
  - Attend any special mandatory meetings as called
  - Participate in cross-functional organizational calls, as needed
  - Contribute to chapter governance and strategic planning
  - Uphold and assure alignment with Chapter Bylaws and PMI Code of Ethics and Professional Responsibility
  - Collaborate with Board members to facilitate appropriate execution of overall goals of PMI Mass Bay
  - Provide required input for monthly dashboard reports

- Review and revise job description in alignment with approved bylaws as needed

## **Qualifications**

### **Required**

- Is a current member of the Chapter in good standing
- Demonstrated excellent communications skills
- Is a self starter with history of high collaboration
- Strong negotiation skills and ability to diplomatic
- Able to define processes and strategy in an ambiguous environment

### **Nice to Have**

- PMP, CPA
- Experience detailed corporate and/or non-profit organization financial reporting
- Been a member of a PMI chapter for more than 2 years, preferably volunteering and/or coordinating with the BOD for PMI Mass Bay

**Reports To:** President

**Fiduciary Responsibility:** Responsible for generating, submitting, gain approval, and managing to a budget.

**Supervisory Responsibility:** AVP Finance and/or other authorized staff and/or committees.

**Length of Term:** 2 program years, renewable (July to June)

**Time Commitment:** Varies. Estimated at 5-10 hours per week, depending on the number of volunteers supporting your efforts. This time includes board meetings, with spikes for various financial reports. In addition, the VP F&T will be expected to attend key conferences such as Region 3 Summit and Leadership Institute Meetings as authorized by the BOD.