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Treasurer

ONE-YEAR TERM

V3_08.17.2026

REPORTS TO

National Treasurer

BACKGROUND

- Experience with budget planning or oversight
- Comfortable reading and interpreting financial reports
- Track record of accountability and compliance monitoring
- Strong communication skills for translating numbers into guidance

TIME COMMITMENT

Estimated: 2–3 hrs/week; 3–5 hrs/event month.

In 2026, WIPA's accounting partner team manages day-to-day bookkeeping and reconciliations, so this role carries less transactional work than in past years.

CHARACTERISTICS

- Detail-oriented and dependable
- Ethical and transparent
- Strong communicator and collaborator
- Skilled at budget planning and oversight
- Comfortable interpreting and explaining financial reports

ROLE SUMMARY

The Treasurer provides financial oversight and ensures fiscal responsibility at the chapter level. While WIPA's accounting partner manages day-to-day bookkeeping and reconciliations, the Treasurer monitors reports, manages budgets, and communicates financial insights to the board to support sound decision-making.

GOAL

Safeguarding the Chapter's Resources

Oversee chapter budgets in alignment with goals and events, review financial reports prepared by National's accounting team, ensure proper documentation is submitted on time, and safeguard the chapter's resources through accountability and compliance.

MOTIVATION

Protecting the Chapter's Long-Term Financial Health

Directors are motivated by ensuring the financial health of the chapter, protecting chapter resources, and contributing to long-term sustainability.

OPPORTUNITIES

Shifting From Bookkeeping to Strategic Budgeting

Focus on strategic budgeting instead of day-to-day bookkeeping, strengthen chapter planning with accurate financial forecasting, and provide board members with clear, actionable financial insights.

CHALLENGES

Turning Numbers Into Guidance the Board Can Use

Staying proactive with deadlines for documentation, translating financial reports into actionable guidance for the board, and ensuring all directors understand budget parameters.

KEY COLLABORATORS

Works closely with the President, VP, Programs, Sponsorship, and National's accounting partner.

Chapter President · **Vice President** · **Director of Programs** · **Director of Sponsorship** · **National's Accounting Partner**

WORKING STYLE CONSIDERATIONS

This role tends to draw on Past-Future thinking, with Present thinking supporting communication and board collaboration. The work involves ensuring financial accuracy, compliance, and accountability, while supporting budgeting, forecasting, and the chapter's long-term sustainability.

This is a conversation starter, not a requirement. Strong Treasurers come from every thinking style, and this is one input among many when a volunteer is exploring the role.