**SWEET PEA OFFICER: SECRETARY/TREASURER TIMELINE & JOB DESCRIPTION**

**On-Going:**

* Track the hours you’ve volunteered monthly; keep your own record to submit to the office at yearend or email your hours when requested by the office
* Attend Executive Board meetings
* Attend Board meetings
* Be an ambassador for the Festival; recruit Festival-time volunteers and potential board member candidates
* Oversee bookkeeping and secretarial functions, as performed by Executive Director
* Oversee appropriate storage of corporate records and signed minutes of Board of Directors meetings
* See that notices of meetings are issued
* Review Board meeting minutes before distribution to the Board; sign “official” copy for permanent records at the office
* See that Board and Committee rosters are kept current
* See that all funds received are safeguarded and properly disbursed
* See that financial reports and budgets are properly maintained (i.e. review prepared quarterly reports, tax report, and annual report before distribution to the Board) as prepared by the Executive Director
* Present quarterly reports, asset summaries, proposed yearly budgets, net funds, etc. to the Board at Board meetings
* Review monthly bank statements and reconciliations
* Help with preparation of yearly budget
* Familiarize self with Parliamentary Procedures for Board Meetings (Robert’s Rules of Order)
* Attend a “newbies” (new volunteers) orientation from time to time
* Contact Division Coordinators on a regular basis; fielding questions, offering encouragement, checking teamwork and morale
* Monitor the Sweet Pea website for accuracy and timely updates
* Act as a liaison between Board and the public
* Be a second signature on Sweet Pea checks requiring such
* Chair the Finance Committee and call meetings as necessary (usually 2-3/year)

**April**

* Coordinate with the Vice President on whether Executive Team is giving out Board shirts this year; after main shirt order is decided upon. Facilitate color and design choice, ordering, and distributing at second July Board meeting

**July-August:**

* Coordinate money handling meeting with Executive Director (include Division Coordinators of Merchandising and Admissions and Chairs from Sales Committees)

# Help establish money handling plan for all Merchandise Pre-Sales (coordinate with Executive Director and Merchandising Division Coordinator)

# Arrange for inventory/accounting, daily change, and money deposit for Crazy Days, Jacobs Crossing, and Lindley Park admission and merchandise sales (coordinate with Division Coordinators and Executive Director)

# Help with daily money handling for Crazy Days, Festival Pre-Sales, Jacobs Crossing sales (week before Festival), and Festival Sales (during Festival) (coordinate with Executive Director)

# Help account for outlet pre-sale money on Thursday prior to Festival

# Oversee change needs and deposit of Art Show entry fees (coordinate with Art Show Chair and Executive Director)

* Oversee change needs and deposit of Admissions income at Farmer’s Market, Bite of Bozeman, and any other ancillary events Admissions sells wristbands at (coordinate with Admissions Festival Sales and Executive Director)

# Select assistants for money handling during Festival weekend (self, Executive Director, office staff, designated event staff: suggestions – Vicki Tate or past Secretary/Treasurers)

* Help with money handling and counting of Festival gate change the week before Festival; this is done at Sweet Pea office a week in advance

**August:**

* Be one of Officers present in Headquarters during Festival, schedule to be determined by Officers. Handle Festival situations as they arise
* Oversee and participate in money handling at Festival – be one of the money handlers. Schedule to be determined by assigned money handlers
* Assist with park tear down on Sunday evening, post-Festival
* Help with money handling and counting after Festival; it is done at Sweet Pea’s bank with fellow Officers and Executive Director on Monday directly after Festival weekend
* Submit feedback on this year’s events – fill out and return evaluation form distributed from office staff

**August-September:**

* Monitor final results of sales – written records of such seeing that summaries are complete and filed
* Oversee plans for Board appreciation dinner. (Coordinate with Executive Director and Hospitality Committee)

**September:**

* Submit all invoices to the office as they are received. All receipts/personal reimbursements are due by Oct. 2nd

**September-October:**

* Review Executive Director performance each year with Executive Board
* Assist with year end wrap-up figures and reports as needed (coordinate with Executive Director)
* Decide if doing Board thank-you cards; if so, sign
* Oversee that the Executive Director has started the budgeting process for the upcoming year. Assist as necessary. Budget should be reviewed by the Finance Committee prior to it being presented to the Board