



## *A Spiritual Center for Creative Living*

### **JOB DESCRIPTION**

Approved 02/25/25

**JOB TITLE:** Board of Trustees Officer - Treasurer

**SUMMARY:** Unity of Bellevue is a spiritual sanctuary and a business. The Board of Trustees is a governing body responsible for overseeing Unity of Bellevue's strategic direction as defined by the vision and mission.

The Board, as a whole is collectively responsible for overseeing Minister Performance, policy development and adherence, financial stewardship, and individual demonstration of Christ consciousness and service commitment.

The Treasurer's accountability to membership is defined in the bylaws.

**RESPONSIBILITY:** The following defines areas of responsibility for the Board of Trustees Treasurer.

1. **Board Member.** As a Board member the Treasurer is responsible for compliance with all aspects of the general Board Member job description.
2. **Annual meeting.** Submit a financial report and give a presentation, covering the last complete fiscal period, at the Annual Membership Meeting.
3. **Governance.** Be conversant in all Unity of Bellevue policy documents (bylaws, policy manual, etc.)
4. **Budget.** Facilitates the preparation of the annual budget in collaboration with the Sr. Minister, input from the Board, and involves others as necessary. Ensures a draft is available for Board review by November and the final version is ratified by the Board before Dec 31 each year. Includes mid-year planning as needed.
5. **Custodian of Funds.** Is the Custodian of Unity of Bellevue funds with responsibilities which include, but are not limited to:
  - Ensuring General Accepted Accounting Practices are in place, that processes have good checks/balances, and all adhere to state/federal legal requirements and IRS regulations.
  - Facilitating and overseeing the 3<sup>rd</sup> party assessment of finances as defined in the bylaws.
  - Paying out, or causing to be paid out, funds authorized by the Board of Trustees.
  - Counting, or causing to be counted, by the appointment of qualified persons, all funds received and ensures appropriate handling of deposits.
  - Placing, or causing to be placed, the funds of this Ministry in the bank or other depository approved by the Board of Trustees.
6. **Signatory.** Authorized signer on investment accounts, signature cards, and, as appropriate, new contracts.

7. **Tithe Committee.** Acts as Board Advisor to the Tithe Committee and assists with selecting tithe recipients in accordance with Unity of Bellevue's tithe policy.
8. **Stewardship Campaign.** Creates and implements a plan for the Stewardship Campaign each year.
9. **Community.** Communicates directly with the community in written or oral form (with congregation or individuals) to promote prosperity consciousness and ensure financial stewardship of Unity of Bellevue. May include financial reporting at scheduled Q&A sessions.
10. **Financial Liaison.** Coordinates directly and maintains a relationship with Unity of Bellevue's bookkeeper and Center Administrator to ensure that the budget is communicated and expenses are properly managed.
11. **Recordkeeping.** Keep, or cause to be kept, a record of all financial transactions. Ensure that the Secretary is given a copy of all financial reports for safekeeping in the Board records.
12. **Reporting.** Receives financial information from the Bookkeeper then analyzes and provides monthly and special reports to the Board or the community as needed.
13. **Demonstration.** Establishes a deep commitment to Board service, promotes UOB policies and prosperity consciousness, personally demonstrates Christ consciousness, and strives for spiritual and personal growth in UWW teachings. Exemplifies the idea of Servant Leadership and that a board member is "never not a Board member" outside of the Board room.