

June 21, 2013

Focus Group: Chapter Treasurers

All 14 Chapter Treasurers and the Guild Treasurer were invited to attend and encouraged to send a representative in their place if that was not possible; 9 Chapters were represented.

Introductions

Discussion Guidelines

Objective Guidelines

For those who are/were Treasurer, how did you get your position? Did you volunteer? If so, why?

Chapters with Bylaws have a nominating committee who looked for volunteers to run for office; others simply volunteered as the position was vacated. In one case, the previous Treasurer wanted a replacement after 12 years of service to her Chapter. In another case, the Treasurer asked questions about Chapter funds and was asked if she'd volunteer for the position.

Is there something in your background that prepared you for the job?

- Schooled in finance
- Had computer skills
- Prior service as Treasurer for other organizations
- Belief that if you belong to a group you have an obligation to volunteer to support that group.
- Belief that, as a group, those who volunteer to be treasurers are honest and trustworthy people

Is the Treasurer's job what you expected?

Generally, yes. Nothing specific written down so expectations were more internal and, therefore, attainable.

Do you have a job description/specific duties?

Only one or two Chapters seem to have written Bylaws with duties.

Has your Chapter set up a budget?

Not really; if too complicated, it turns people off.

There is no cohesion in the group re: how to spend money but there is the thought that snowbirds "miss out on the bennies" so one chapter set up focus groups to see how much money each committee could spend without going back to the group for approval. They discovered that a LOT of money goes to charity.

What issues/problems do you have as Treasurer?

New chapters have trouble getting members to submit receipts for reimbursement ... and most money goes to charity.

One chapter has a blanket requirement that any expense above \$50 needs approval; most money goes toward making charity quilts.

Another chapter recently changed banks to BB&T [Note: following Focus Group for Presidents finding that they do not require a \$500 set-aside.]

What issues/problems does your Chapter have with the Guild Treasury position, if any?

- Members ask Chapter Treasurers questions about the Guild treasury so they would like to have copies of the Guild Treasurer's reports.
- Members are very concerned about "all the money" being brought in by Showcase and MarketPlace. Chapter Treasurers, like all Guild members, have the right to ask to see the Treasurer's Report but the way it is distributed now puts the burden on them to seek out the information. [NOTE: Currently the Guild Treasurer electronically submits a copy to all Executive Board members prior to E-Board meetings. It is no longer read at the general membership meetings but attendees are told a copy is there for the viewing. Apparently Chapter Presidents are not automatically sharing this information with their respective Treasurers.]

SUGGESTION: The Guild Treasurer should be asked to include Chapter Treasurers on the email distribution of the monthly Treasurer's Report.

SUGGESTION: Guild Treasurer's Report would be improved if done as a spreadsheet by Guild program/Standing Committee, showing the amount budgeted and then actual expense and income details. Also, each item should detail what was purchased, not just the name of the member being refunded. That information would be helpful for future budgeting and make it easier to explain where the money goes.

What can the Guild do to make your job easier?

QUESTION: Could the Guild and its many Chapters have a better negotiating position if we brokered a deal together for its various banking accounts?

The consensus was that Chapter Treasurers would welcome some form of internal audit or review of Chapter accounts. Only one Chapter has a CPA audit and that is a Villager who has volunteered to do this for several years.

One new chapter treasurer remarked that she now realizes there is a gap of information and wonders why.

Did you attend the Guild Budget Meeting?

Two people did not know about the meeting and missed it altogether; at least one other could not attend the meeting after it was rescheduled.

- Several members of one chapter voiced concern about all the money going to Programs so she reminded them that the 'younger generation' is interested in learning new things and doing outreach in the community.
- One person mentioned she was shocked at how much money the Guild spent on storage and others nodded agreement to that; members don't realize what is being stored and how much that costs.

- Another person was shocked at the money being paid annually to the CPA and questioned whether that was for an official audit, or for tax preparation alone. There was a follow-up question:

QUESTION: Does the IRS require an annual audit by a certified CPA? No one knew.

Were there any “Ah-ha” moments from today’s meeting?

There were no giant ‘ah-ha’ moments but a consensus that information is not getting down to Chapters although several Chapters have moved to BB&T. [NOTE: It was not apparent from the comments that the information about BB&T came from the LRP Focus Group for Presidents.]

It was good to have a forum to exchange information which led one member to ask about others’ work at the Showcase. Being new, she had no idea what to expect but was bored to spend two hours sitting around to do eight minutes worth of work. Another person said her shift was very busy but “a group arrived ... they were loud and made it difficult to count” money and she was surprised they were even allowed into the Green Room when she had been led to believe it was restricted access. No one introduced anyone to anyone else in the room; made it uncomfortable.

Regarding charitable giving, members shared the types of things their Chapters use dues and income to support:

- Batting and backing fabrics for charity quilts
- Education programs
- Professional long-arm quilting of a charity quilt
- 4-H Project
- Sunshine fund for cards
- Office and quilt supplies for meetings
- Special set-aside funds are used for pay-as-you-go things like retreats and bus trips
- Money sent direct to charities

SUGGESTION: Guild should publish a list of what money and goods go to charity every year. [NOTE: This was done when the new website was created in April 2011; an update was requested but never provided for the level of giving reported to the IRS in 2012.]

One of the benefits of LRP is that it is giving members a chance to meet others who share their concerns and a forum to discuss issues.

Focus Group Feedback Questionnaire: Chapter Treasurers

	Poor	Fair	Good	Excellent
1. The agenda was clear			1	8
2. The objectives were appropriate			2	7
3. The location of the meeting			3	6
4. The amount of information shared			1	8
5. The opportunities for participation and sharing				9

Was the focus group worth your time?

Yes (9)

- Definitely worth my time. I want to work with my chapter budget to keep everyone better informed.
- Exchange was good.
- It was interesting hearing what the different groups do as far as their treasury is concerned.
- Learned a lot.

What went well in this focus group?

- One person spoke at a time. Very good! Good ideas expressed.
- Learned a few things.
- Listening to each other's ideas and suggestions.
- Much sharing; eye opening discussions.
- Interesting information was passed around.
- Information exchange.
- Well led.
- Lots of discussion on what other Chapters are doing.
- Everyone seemed comfortable and willing to participate. Liked attendance of Executive Board [NOTE: This must refer to the LRP Committee members taking notes.]

What could have gone better?

- Very well organized.
- The Guild leadership group had a lot to say.
- ?
- No. It was a good job of organization.
- Talking.
- Greater attendance by Treasurers.