

San Luis Valley Behavioral Health Group

Member of the Board of Directors

Board Treasurer

Purpose: To advise, govern, oversee policy and direction, and assist with the leadership and general promotion of the San Luis Valley Behavioral Health Group to support the organization's mission and values.

Vision: To Improve the quality of life for the residents of the San Luis Valley.

Mission: To provide access to quality behavioral health services that enrich lives and promote wellness. We are driven by a profound respect for human dignity and a desire to serve the underrepresented, the disenfranchised, and those who experience behavioral distress.

Values: see attached Values Statement

Position Overview:

The Board Treasurer is responsible for overseeing the organization's financial health and integrity. This role involves managing financial records, ensuring compliance with financial regulations, and providing financial oversight and guidance to the board. The Treasurer works closely with the Board Chair, Chief Executive Officer, and finance staff to support the organization's financial sustainability and accountability.

Key Responsibilities:

1. Financial Oversight:

- Oversee the organization's financial operations and ensure financial policies and procedures are followed.
- Monitor the organization's financial health and provide regular financial reports to the board.
- Review and approve the annual budget, financial statements, and audit reports.

2. Financial Reporting:

- Present financial reports at board meetings, highlighting key financial metrics and issues.
- Ensure that financial reports are accurate, comprehensive, and understandable for board members.

3. Budgeting and Planning:

- Support the annual budget development in collaboration with the Executive Director and finance staff.
- Monitor the budget throughout the year and report on variances and financial performance.
- Assist in long-term financial planning and strategy development.

4. Compliance and Risk Management:

- Ensure compliance with all financial regulations and legal requirements, including tax filings and audits.
- Monitor and manage financial risks, including internal controls and fraud prevention.
- Ensure that financial records are maintained and accessible for audit and review.

5. Fundraising and Resource Development:

- Support fundraising efforts by providing financial insights and reports.
- Collaborate with the fundraising committee to develop and implement financial strategies.
- Ensure accurate tracking and reporting of donations and grants.

6. Investment Management:

- Oversee the organization's investments and ensure they align with its financial goals and policies.
- Monitor investment performance and provide regular updates to the board.

7. Board Support and Development:

- Assist in recruiting, onboarding, and developing new board members, particularly understanding financial responsibilities.
- Provide financial training and resources to board members as needed.
- Serve as a resource for board members on financial matters.

Qualifications:

- Strong background in finance, accounting, or related field.
- Experience in financial management, preferably in a non-profit organization.
- Knowledge of non-profit financial regulations and compliance requirements.
- Excellent analytical, organizational, and communication skills.
- Proficiency in using financial software and tools.
- Commitment to the organization's mission and values.

Meeting and Time Commitment:

- The Treasurer is expected to dedicate significant time to board duties, including attending regular board meetings, finance committee meetings, and organizational events.
Meetings and time commitment:
- The Board of Directors meets monthly on the last Tuesday of the month, at 5:00 pm, at the Alamosa San Luis Valley Behavioral Health Group location, with an option to join the meeting remotely via Zoom. Meetings typically last 2-4 hours.
- Committees of the board meet an average of four to six times per year, pending their respective work agenda.
- Board members are asked to attend several special events per year as they are determined. CBHC Conference, Board Appreciation Christmas Dinner, Employee Recognition Luncheon, Annual Strategic Plan Retreat, and Health Colorado Retreat.

(Note: board presence may be requested at other impromptu community events or meetings. For example, an open house.)

Expectations of Board Members:

- Attend and participate in meetings in accordance with the bylaws
- Attend special events
- Participate on a standing committee of the board and serve on ad-hoc committees as necessary.
- Be alert to community concerns that can be addressed by the San Luis Valley Behavioral Health Group mission, objectives, and programs.
- Help communicate and promote the San Luis Valley Behavioral Health Group mission and programs to the community.
- Become knowledgeable about the San Luis Valley Behavioral Health Group programs, finances, budget, and financial/resource needs.
- Become familiar with the policies and procedures of the San Luis Valley Behavioral Health Group.

Compensation:

Directors shall not receive compensation for their services as such, although the reasonable expenses of directors of attendance at board meetings may be paid or reimbursed by the Corporation. Directors will be given a \$45 monthly stipend to be used towards meeting expenses.

Term Limits:

The term of office for the Treasure is one year, with a two-term limit. Officer elections occur yearly at the end of the fiscal year.

I understand the roles and responsibilities outlined in the job description that was provided to me.

Board Member Signature

Date

Board President Signature

Date