UNC Charlotte

***IMPORTANT:** All Executive Board Titles are year long positions. If you are unable or willing to commit to this position please inform Cindy Fox or someone on the Executive Board. This means, if you are planning to graduate in the Fall, you will NOT be able to apply. All new appointed Executive positions should be interviewed on at the end of the Spring semester by current President and Vice President to prepare for the following Fall semester of the new school year.*

VP of Finance Responsibilities and Duties

Commitment & Leadership Expectations

- This is a **year-long leadership position** requiring accuracy, accountability, and strong organizational skills.
- The VP of Finance is responsible for the **financial health, transparency, and sustainability** of the Chapter.
- Expected commitment: **2–5+ hours per week**, with increased time during major events and funding cycles.

Financial Management & Oversight

- Maintain and oversee all **Chapter financial accounts**, ensuring they are accurate, up-to-date, and in good standing at all times.
- Track all incoming and outgoing funds, including **fundraising revenue, expenses, and reimbursements**.
- Ensure all **collegiate memberships and Chapter dues** are properly collected and submitted.
- Monitor and manage the use of any **credit/debit cards**, ensuring all transactions are documented and approved.

Budgeting & Strategic Planning

- Collaborate with the President and Vice President to develop and maintain a detailed **budget and funding plan (Excel sheet)** for the academic year.

- Allocate funds strategically to support **events, professional development opportunities, and Chapter initiatives**.
- Provide budget recommendations to support **sustainable growth and high-impact programming**.
- Help plan financially for large-scale opportunities such as **conferences, competitions, and national events**.

Reporting & Financial Transparency

- Create and maintain a detailed **Excel budget and funding tracker**, ensuring all data is accurate and consistently updated.
- Provide regular **financial updates during Executive Board meetings**, including current balances, spending, and projections.
- Prepare **written financial reports for each event**, outlining funds collected, expenses incurred, and overall outcomes.
- Ensure all financial records are organized and accessible for reporting, audits, and leadership transitions.

Fundraising & Revenue Support

- Work closely with the **Events and Fundraising Director** to track and verify all funds collected during fundraising initiatives.
- Assist in planning and executing fundraising strategies to support Chapter goals (benchmark: contributing to **$4,000+ annual fundraising efforts**).
- Help evaluate the **financial success and ROI of events and initiatives**.

Compliance & Accountability

- Ensure all financial practices comply with **UNC Charlotte policies and AMA National guidelines**.
- Communicate proactively with the Faculty Advisor (Cindy Fox) regarding any **financial issues, discrepancies, or concerns**.

- Maintain accurate records to support required **Chapter reports and funding applications**.
- Ensure all funds are handled responsibly, ethically, and transparently.

Security & Risk Management

- Safeguard all **financial assets**, including cash, cards, and account access.
- Maintain secure records of all **passwords and financial information**, ensuring proper transfer to future leadership.
- Implement checks and processes to minimize risk, errors, or misuse of funds.

Philanthropy & Community Impact

- Support and help lead **philanthropy initiatives**, including donation drives and partnerships with organizations (e.g., food insecurity efforts).
- Ensure proper tracking and reporting of **charitable funds and contributions**.

Organization & Collaboration

- Maintain organized financial systems and documentation for **efficient tracking and reporting**.
- Collaborate with:
    - President & Vice President (budgeting and strategy)
    - Events & Fundraising Director (event finances)
    - Executive Board (budget decisions and planning)
- Support event planning by providing **financial insight and feasibility analysis**.

Performance & Excellence Standards

- Contribute to the Chapter's overall success by ensuring **financial stability and growth**.

- Support funding efforts that enable:
  - Member attendance at conferences
  - High-quality events and programming
  - Chapter recognition at the national level (e.g., ICC)
- Continuously improve financial processes for **efficiency, accuracy, and scalability**.

Additional Expectations

- Be detail-oriented, trustworthy, and **highly organized**.
- Communicate clearly and consistently with leadership regarding financial matters.
- Be proactive in identifying opportunities to **save, allocate, and grow funds**.
- Ensure a smooth **financial transition** for future VP of Finance leaders.

In Short,

- Ensure all collegiate membership and chapter dues are paid.
- Keep track of all funds collected during fundraising events and other activities.
- Work with the president and vice president to craft an Excel Funding and Budget sheet.
- Discuss funding reports of the Chapters standing at executive meetings to determine budgets for future chapter outings or events.
- Exemplify student integrity and assist fellow members in professional and personal growth development.
- Communicate clearly with our sponsor and Faculty Advisor, Cindy Fox about any funding issues if any were to arise.
- Keep the Excel Budget file up to date and accurate.
- Be current with all accounts for the Chapter.
- Any credit card or debit card needs to be tracked at all times with any given purchase.
- All passwords and cards must remain in safe keeping and passed on to the subsequent Treasurers.

- Make a written report of what funds are collected or spent for every event and report this information to the President and Vice President.
- Coordinate with the Events and Fundraising Director when receiving funds from fundraising events
- Help Events and Fundraising Director with upcoming plans for events/ socials/ etc
- Lead philanthropy and community impact efforts, coordinating donations and food insecurity initiatives in partnership with other organizations

An individual in this position can expect to dedicate 2 to 5 hours per week.