

## Intergroup Treasurer Guidelines

OA intergroups are self-supporting (in accordance with Tradition Seven) through contributions from individuals and OA groups. These contributions help the intergroups carry the OA message of recovery. OA intergroups use these funds to cover their expenses and services, usually forwarding the surplus funds to their region and the World Service Office based on a percentage agreed upon through a group conscience.

Intergroup funds generally subsidize such services as:

- Rent for the meeting place
- Post Office box fees
- Copying and postage expenses
- Telephone and/or voice messaging services
- Delegate/Region Representative expenses
- Web site set-up and maintenance
- Literature for Public Information and Professional Outreach
- Expenses associated with retreats, workshops, OA celebrations and events
- Newsletters and meeting lists

The intergroup treasurer keeps clear, simple records and reports to the intergroup and member groups how much money is coming in and how it is spent. Many intergroup treasurers provide a spreadsheet that shows income and expense items and amounts.

### **An intergroup treasurer usually satisfies these obligations:**

The treasurer meets bylaw qualifications for the position, which generally include a minimum period of abstinence and demonstrated recovery. The treasurer establishes and maintains a checking account for the intergroup, pays bills and makes deposits promptly, updates the bank

signature card when needed, creates a spreadsheet for regular reports and money tracking, balances the bank statement against receipts and checkbook regularly, creates and maintains expense forms, manages the treasury archives, maintains a prudent reserve and oversees regular reviews of financial documents. The intergroup treasurer ensures appropriate safeguards are used to protect the assets of the intergroup, i.e., making sure there are dual signatures on checks.

The treasurer manages the budget by asking for annual budget requests from committee chairpersons and board members, using the *OA Budget Guidelines for Service Bodies*, chairing the budget committee, creating an annual budget and presenting the budget for intergroup approval.

Finally, the treasurer attends intergroup meetings regularly; presents and provides a report; completes required state, federal and local governmental forms as needed; retains financial records for an appropriate amount of time; collects the Seventh Tradition at intergroup meetings (if there is a collection); interacts with member group treasurers regarding monetary issues; and creatively looks for ways to reduce intergroup expenses and increase funds. The outgoing treasurer also helps train the new intergroup treasurer.



OA Board-Approved

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