

US JCI SENATE



2016 - 17 STATE TREASURER'S MANUAL

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STATE TREASURER'S MANUAL

Congratulations on your election as Treasurer! Hopefully the following information will assist you throughout the year as you perform your duties.

If you have questions as you review this information, please contact the US JCI Senate Treasurer or Membership Information Services Program Manager. They are resources for anything treasury related that might come up this year.

ANNUAL DUES

Annual dues to be a member of the US JCI Senate are five dollars (\$5).

- The membership year is July 1st to June 30th.
- Dues are collected on a quarterly basis; to be received on or before:
 - September 1st
 - December 1st
 - March 1st
 - June 1st

ROSTER

- Obtain your current State roster from the US JCI Senate Membership Information Services Program Manager
- The roster will reflect all dues paid Senators submitted by your State.
- The roster will contain the following information:
 - Senator's Name
 - Senate Number
 - Address
 - Due Date
 - Life Member Status

QUARTERLY DUES KITS

- Kits will be sent electronically approximately 6-8 weeks prior to the due date for the quarter.
- Each kit will contain the following;
 - **Cover Sheet**
This should be completed and mailed along with a check for the amount of dues owed, to the US JCI Senate Treasurer. It must be received no later than the 5th of the month for the appropriate dues quarter.
 - **State Roster**
This serves as your quarterly update of your current membership. Review this very carefully to ensure that the information you submitted the previous quarter is correct. If any information is highlighted in yellow, it is making you

aware of a change from the Membership Information Services Manager. Most of these changes are most likely address changes. It is important that you update your records with this information.

○ **Dues Billing Form**

This will reflect your entire roster with the current quarter marked in red. You will want to include any listed Senators to be dropped on the Add / Drop / Change Form. If a member is not listed to be dropped on that form it will be presumed that they are to be renewed. When you have completed your dues billing you need to electronically send it back to the Membership Information Services Program Manager no later than the date it is due. **Do not make changes on the dues billing form.** Use the Add / Drop / Change form for all changes of names, addresses, senate numbers, life membership number, etc.

○ **Add / Drop / Change Form (See Example D)**

Only use this form to make changes, drop a current member or add new members. **Do not try to renew members on this form.** When adding new members there is a column indicating whether this member is already a member of another state, please mark this column with an X if appropriate. Highlight the changes you are making. This makes it easier for data input. Once you have completed your Add / Drop / Change form you will need to electronically send it back to the Membership Information Services Program Manager no later than the date it is due. You may submit address changes using the Add / Drop / Change form at any time throughout the year. Members can only be dropped during the quarter they are due...this includes deceased members.

WHEN COMPLETING THIS FORM, USE ALL CAPITAL LETTERS.

If the US JCI Senate Treasurer does not receive your cover sheet and check by the 5th of the month due, he/she will electronically notify you. This notification will be copied to the Membership Information Services Program Manager and your National Vice-President.

IN SUMMARY;

After completing your dues kit you will:

1. Electronically send the entire kit back to the Membership Information Services Program Manager. This will include:

- the completed cover letter,
- the Add/Drop/Change form with:
 - All new member information listed
 - All members to be dropped listed
 - Any address changes listed.
 - Any new life time membership numbers listed (only include life members of the US JCI Senate)

2. Send only the completed cover letter and check to the US JCI Senate Treasurer.

GENERAL INFORMATION

The accepted form of payment for dues is a check or money order payable to the US JCI Senate. This is the same for any checks sent in for Mentors or the presidential raffle.

MENTORS

Mentors is the official publication of the US JCI Senate. It is published and distributed 3 times per Senate year in; September, December, and April

As State Treasurer it is important for you to know the following about Mentors:

1. Mentors is mailed to every Senator who is a current dues paid member.
2. The US JCI Senate Membership Information Services Program Manager supplies the Mentors publisher a mailing list for the purpose of printing mailing labels for the magazine. **Note:** The mailing label information comes directly from your roster. If information is wrong on your roster then there is a good chance your members will not receive their Mentors. Remember to use the Add / Change form to ensure everyone receives their Mentors.
3. The mailing label information is sent to the publisher approximately 4 weeks before distribution.
4. The printer for Mentors checks for the accuracy of addresses and notifies the Membership Information Services Program Manager of any bad addresses, who will, in turn, notify each affected state treasurer.
5. Mentors has an Editor and a Business Manager.
 - Mentors Editor: Receives all the written text for the magazine and assembles it for publication.
 - Mentors Business Manager: Collects all monies for meeting / event sponsorships and display ads. Promotes the sale of advertising in the magazine.

States are encouraged to sponsor an ad for every meeting or event conducted by your state Senate organization.

To place a meeting/event sponsorship follow these steps:

1. Staple a sign-up sheet (see Example E) to a large (10 x 13) envelope.
2. During the meeting/event pass around the envelope encouraging each member and guest to sign the sheet – please print clearly - and place a minimum donation (\$2) inside the envelope.
3. After the meeting/event is over you will need to count the money collected and write a check, payable to the US JCI Senate, for that amount.

4. Send the sign in sheet(s) and the check to the US JCI Senate Mentors Business Manager”

Susan Hatcher #58143
532 Woodlyn Crossing
Ballwin, MO 63552
Phone #: (636) 391-0787 (H)
(314) 570-0482 (C)

5. Remember: Any checks or money orders are to be made out to the US JCI Senate.
6. Pictures are also encouraged and they may be sent electronically to the Mentors Editor; be sure to identify the subject(s) with their senate number and the occasion. Pictures can be sent to: mentorseditor@aol.com

HELPFUL HINTS

1. Always keep a copy of any correspondence – this includes dues billings!
2. Have your State President send out a pre-renewal letter 6 weeks prior to the due date encouraging members to renew and/or purchase a life membership (if applicable). Be sure to include information about upcoming Senate activities and other reasons to renew their membership (see Examples B and C). Provide a pre-addressed envelope with the letter in order to make it effortless for them to renew! This has been very successful for many states.
3. Pay the bills and make deposits in a timely manner.
4. Develop some sort of receipt voucher process (see Example A) to make it easier for you and to ensure clarity during an annual audit of the books.
5. Prepare an annual budget and have it approved at the first meeting of the year and send US JCI Senate Treasurer a copy if you wish.
6. Provide written financial reports at every meeting.
7. Establish a Finance Committee or elect or appoint an Associate Treasurer to maintain the integrity of the financial situation of your state.

US JCI SENATE QUARTERLY DUES BILLING COVER SHEET

Enclosed is a roster showing all Senators from your state due for renewal by (**Due Date**).

Use the enclosed Add/Drop/Change (A/D/C) form to add new members (including those members who may have been dropped on previous dues billing). Please mark the member of another state column if necessary. Be sure to put the notation "Add" in the A/D/C column.

Please list the members who should be dropped on the Add/Drop/Change form with the notation "Drop" in the A/D/C column. Only members due this quarter may be dropped. If a member is not listed to be dropped on that form it will be presumed that they are to be renewed..

This form should also be used to change any of the listed information about current members (addresses, correct spelling on names, etc.) on your state roster. Place the notation "Change" in the A/D/C column with the change being highlighted.

Send Dues Billings, Add/Drop/Change form and this completed Cover Sheet electronically to the Membership Information Services Program Manager by:

September 1, 2016 December 1, 2016 March 1, 2017 June 1, 2017

at gpitt1@comcast.net or mail it to:

Gary Pittenger #24804
338 S. Nebraska
Morton, IL 61550
(309)266-6464

Only this cover sheet and the check for the amount due should be sent to the US JCI Senate Treasurer by above dates listed.

Lawrence Pittman #53932
Treasurer US JCI Senate
442 Cedar Lane, Arden, North Carolina 28704
(828) 230-4944 (C) (828) 684-8087 (H) pittmanavl@charter.net

State: _____ JCI SENATE

Person submitting the kit: _____

Number of Members Due: _____

Number of Members Dropped: _____

Number of Members Renewed: _____ @ \$5.00 = \$_____ .00

Number of New Members: _____ @ \$5.00 = \$_____ .00

CHECK #: _____ **TOTAL PAYMENT DUE:** \$_____ .00

September 1, 2016 December 1, 2016 March 1, 2017 June 1, 2017
Please make checks payable to US JCI Senate.

EXAMPLE A

ABC JCI SENATE CHECK REQUEST FORM

Date: _____ Amount: _____

Requested by: _____

Project or Purpose of Request: _____

Description of Purchase: _____

Make Check Payable to: _____

Send Check to: Address: _____

City, State Zip: _____

Phone Number to Contact for Any Questions: _____

E-Mail Address to Contact for Any Questions: _____

For Treasurer's Use Only

Approval Authorization To Pay

Check Number: _____

President: _____

Date Paid: _____

Treasurer: _____

Check Amount: _____

Motion By: _____

Voted on at General Meeting Yes No

Seconded By: _____

Approved as part of Budget: Yes No

Approved: Yes No

**ATTACH ALL RECEIPTS SUPPORTING PURCHASE TO THIS FORM.
RECEIPTS MUST TOTAL AT LEAST THE AMOUNT REQUESTED.**

EXAMPLE B

Date

Dear Senator:

I am excited to be serving as President of the XYZ JCI Senate for the 2014-2015 year. The Board of Directors has planned a full calendar of events for the year and hope that you will be part of the fun and fellowship. I would like to ask you to renew your membership for this coming year. For \$\$\$, you will continue to be an active member of the XYZ JCI Senate and the US JCI Senate. Some of our upcoming activities and benefits for continuing your membership include: (List a few of your upcoming events/services)

(If Applicable – include information on your Lifetime Membership Program)

For more information on our upcoming events, please visit the XYZ JCI Senate website at www.xyzjcisenate.org, or contact me at (123) 456-7890,

To continue your membership, please complete the form below and mail it with your \$\$\$ check **by Your Deadline Date** to our Treasurer, Milburn Pennybags, at the address listed below.

Sincerely,

Your Name, #99998
President 2015-2016

Name: _____ Senate Number: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Home Phone: _____ Cell Phone: _____

E-mail Address: _____

- Are you willing to be a resource for the XYZ Jaycees (training, mentoring, recruiting, etc.)?
 YES NO
- I prefer to receive the newsletter via Regular Mail (versus email)
 YES NO
- I would like to make a donation to: (include any state-wide emphasis project, foundations or other programs which may be appropriate for your state) Amount: \$ _____ .00
- I would like to support the USJCI Senate Foundation scholarship efforts by becoming a Foundation Member: YES NO (Forward affirmative responses to Earl Sawyer)

Please make your check payable to XYZ JCI Senate and mail by Your Deadline Date to:

Milburn Pennybags #99999
XYZ JCI Senate Treasurer
109 Park Place
Monopoly City, XY 98765
(987) 654-3210

EXAMPLE C

DATE

Fellow Senator,

Like me I'm sure you can recall the exact moment you first realized it was YOU they were talking about as the list of offices, accomplishments and projects were read for the next person being honored by their chapter with the highest honor a Jaycee could receive, a JCI Senatorship. Today, while the number of JCI Senatorships bestowed worldwide is over 70,000, we still make up less than 1% of all people who have been Jaycee. You truly are the cream of the crop!! The XYZ JCI Senate has a priority this year to reach out to those who have not been members to encourage them to rejoin our ranks as an active JCI Senator and member.

While the Senate will continue to be a social organization that allows us to continue the friendships that we cultivated when we were Jaycees, an additional initiative this year will be to help support the XYZ Jaycees and our local chapters. Over the last several years the XYZ Jaycees' membership, as well as Jaycee membership nationwide has decreased. While there are many reasons for this, the fact remains that the Jaycees are still THE organization for young people who want to create positive change and foster leadership training through community service. The XYZ Senate is committed to offering to provide needed mentoring, advice, success stories and more in order to help the XYZ Jaycees succeed in achieving their goals this year and into the future. We are asking you to help, by not only renewing your membership in the Senate, but also sharing your ideas and thoughts. Hopefully, you'll remember the first time a Senator took a moment of their time to recognize you. Those moments are priceless to the Jaycees.

We made things happen as Jaycees. We can continue to do the same as Senators. I hope that you will join me and your fellow JCI Senators in giving back to the Jaycees and having fun in the process...what more can we ask for?

Sincerely,

Your Name, #99998
President 2015-2016

P.S. Attached is a copy of the dues letter that you should have received before. This will give you more information about what the upcoming year for the XYZ JCI Senate.

**UNITED STATES JCI SENATE
MEMBERSHIP ADD/DROP/CHANGE FORM**

Date: August 1, 2013
Page: 1

State: PDQ JCI Senate
Person Submitting: Peter Schickele
Phone: (091)827-3645

MEMBER OF ANOTHER STATE	Add (A)/Drop (D)/Change (C)	FIRST NAME	LAST NAME	SENATE #	LIFE #	ADDRESS	CITY	STATE	ZIP CODE
Yes	A	Abby	Figera	98765		1721 Overature Drive	Leipzig	GA	45693
No	A	Canzonette	Hooplina	85213		16 Dutch Suite	Blaues Gras	PDQ	15973
No	D	Hardart	Horn	45671		18 La Pucelle de New Orleans	Capriccio	PQD	96321
No	D	Fugue	Goldbrick	75533	789	4 Curnudgeonly Canon	Fantasiesthick	PDQ	11559
No	C	Sundrie	Notions	75319		1 444/100 Ayres	Peruckenstuck	PDQ	86753
No	C	Betty-Sue	Bach	75335	333	150 Oedipud Tex	Toot Suite	PDQ	69874

EXAMPLE D

