



TREASURER RESPONSIBILITIES

Thank you for accepting the role of Community Alliance Treasurer! You hold an important position within your Community Alliance. You are responsible for ensuring our donor's funds are handled appropriately. This guide will help you in the process of accounting for revenue and expenses, and ensuring a low cost-to-raise a dollar ratio.

INCOME

There are four ways your Community Alliance will collect funds; online fundraising via Crowdrise, checks, cash, and credit card transactions via Square (Point of Sale). The information below outlines procedures associated with each method.

The Event Chair & Treasurer are responsible for creating a realistic budget for every fundraiser or event. We want you to be successful! Creating a budget will give your Community Alliance a goal and guide your fundraising efforts. You can use the [Event Budget Form](#) as a template. Please update this form to keep a running record of the proceeds from your event or fundraiser.

When recording income, please indicate if the income is a donation, raffle ticket sales, on-site registrations, auction item sales, etc. You can use the [Registration/Transaction Form](#) to record this information. It is important to record the purpose of the income to determine if it is tax-deductible.

Crowdrise

Angioma Alliance uses Crowdrise to collect online donations and fundraise. Your Community Alliance has a Crowdrise donation page. You can get the URL from Stephanie at salband@angioma.org.

Those donors who wish to make a general donation in honor of your Community Alliance can be directed to the Crowdrise donation page.

When your Community Alliance holds a fundraiser or event, you can create a customized webpage on Crowdrise for everyone to participate. You can create a **fundraiser** or an **event**.

A **fundraiser** is a campaign, where individuals can go to create their own pages to ask for support. It may or may not coincide with an event. For example, your Community Alliance, or an individual in your Alliance, may want to run a fundraising campaign in recognition of Cavernous Angioma Awareness Month, encouraging their friends and family to donate. The Event Co-Chair or Treasurer (or anyone) can create a fundraiser. When creating a fundraiser for your Community Alliance, you will go to the general URL page mentioned above and click on "Join the Team and Create Your Own Fundraiser." You will need to customize the page with pictures and a description of the fundraiser. After creating the fundraiser, you can share the URL with your community. Whoever creates the fundraising campaign will be able to pull a report with a list of fundraisers and donors.



ANGIOMA ALLIANCE

because brains shouldn't bleed

An **event** is a fundraising campaign that usually includes registration. Stephanie can create an event for you. You will need to provide her with the event name, date, location, registration options and cost, pictures, and event description. Stephanie can help you answer these questions. After creating the event, you can share the URL and include it in the flyer. People will use this webpage to register. Stephanie can pull a report for you with the list of registrants, fundraisers, and donors.

All Crowdrise donations are automatically sent an acknowledgment for tax purposes, and an email thank you from Angioma Alliance.

Checks and Cash

Donors should write checks to “Angioma Alliance” and send to Angioma Alliance, 161 Jefferson Dr. Palmyra, VA 22963. Cash and checks should be **sent in within two weeks** of receiving them so we can send a timely tax receipt. Please turn cash donations into a cashier’s check or money order before mailing. Please do not hang onto checks and cash. You can mail donations as frequently as you like. Don’t forget to collect the donor’s information including their address when receiving cash.

When collecting cash and checks, please use the **Cash/Check Reconciliation Form**. You and another volunteer will count petty cash before an event or fundraiser and enter the information on the form. After the event or fundraiser, you and a volunteer will again count the cash and checks and enter the information on the sheet and initial. Please take a picture of the form and send to salband@angioma.org asap. Then send the cash and checks to the Palmyra address within two weeks.

Occasionally, a donor will ask for a tax receipt immediately. Print out some of the **Day-of Tax Receipt Forms** to have on hand.

Square Credit Card Transactions

A Square credit card reader is available for you to use with your tablet or phone before the event and on the day-of. It plugs into your phone, tablet or laptop device. You can swipe credit cards or enter the credit card info manually. Please note, **the Square reader does not capture the donor’s name**, only credit card information and the amount. So, you every time you use square you need to capture the donor's name, address, email and the last four digits of the card. You can use the **Registration/Transaction Form** to record this information.

Please reach out to salband@angioma.org to have the square sent to you. Do not download the app until you receive an email directly from Square, which is initiated by Stephanie. Please allow a minimum of a week for setup and shipping time.

Day-of Treasurer List

Here is a list of items you may consider bringing to an event or fundraiser:

- Cash bag or cash box (you can get free cash bags from your bank)
- Petty Cash
- Cash/Check Reconciliation Form
- Registration/Transaction Forms
- Square Credit Card Reader
- Charged Square device
- Day-of Tax Receipts
- Stapler
- Pens



EXPENSES

Every event has expenses. Please remember that donors, just like you, look at our “cost to raise a dollar” to ensure that most of the funds raised are spent on the mission of Angioma Alliance. **A general rule to follow is that 25% of your fundraising goal can be allocated to expenses. It is usually very easy to spend much less. Some expenses may be reimbursed by Angioma Alliance if they are pre-approved by Angioma Alliance staff and the President of the Community Alliance.** Please use the [Event Budget Form](#) as a template to record expenses.

Angioma Alliance requires that you submit expenses with receipts and invoices. Expenses can be paid when they are incurred or at the end of the event.

There are several ways to pay for event expenses:

1. You can pay for the expense upfront and submit a receipt to Angioma Alliance for reimbursement. A check will be sent to you within a week of receiving your receipt or we can reimburse you via PayPal if you prefer.
2. For larger expenses, our office can call in a credit card number to the vendor.
3. You or a donor can pay for the expense and use it as a gift-in-kind donation to be claimed as a charitable tax deduction. We will need the name and address of the donor, the item donated, and the fair market value of the item (what it would cost to purchase).
4. If you have collected cash before the event and you have carefully tracked its source and the amount, you can draw on this cash to pay small expenses like raffle tickets or food for volunteers. Receipts must be submitted for cash expenditures at the end of your event. Please indicate the expense reimbursement on the [Cash/Check Reconciliation Form](#).

Please do not open a bank account for the event or deposit any money from the event into your personal account.