



STATE TREASURER TRAINING

Dawna Norfleet #61999

TREASURER-ELECT US JCI SENATE

CONTACT INFO:

treasurer@usjcisenate.org



AGENDA

2026-2027 STATE TREASURER TRAINING

PURPOSE OF TRAINING	Dawna	5 MINUTES
INTRO OF PROGRAM MANAGERS	Dawna	2 MINUTES
ROLES OF STATE TREASURERS	Dawna	5 MINUTES
PRESIDENTIAL SWEEPSTAKES TICKETS	Nancy	5 MINUTES
MEMBERSHIP	Lisa	20 MINUTES
MENTORS	Dale	10 MINUTES
OUTSTANDING TREASURER EXPECTATIONS	Dawna	5 MINUTES
QUESTIONS		



ROLES OF THE STATE TREASURER

ACCOUNT FOR THE MONEY RECEIVED, SPENT AND INVESTED BY THE STATE ORGANIZATION;

ENSURE ALL THE MONEY IS ACCOUNTED FOR.

GO-TO PERSON WHEN MANAGEMENT HAS CONCERNS OR NEEDS FINANCIAL ADVICE.

MAINTAIN HIGH ETHICAL STANDARDS AND ANALYTICAL ABILITY.

TYPICAL DUTIES OF A STATE TREASURER

DUTIES OF THE STATE TREASURER ARE USUALLY DEFINED IN THE STATE CONSTITUTION AND BYLAWS.

HERE ARE SOME EXAMPLES:

A. THE TREASURER SHALL HAVE THE RESPONSIBILITY FOR ALL FUNDS AND SECURITIES OF THE ORGANIZATION UNLESS DIRECTED DIFFERENTLY BY THE EXECUTIVE COMMITTEE.

B. THE TREASURER EXPENDS CORPORATION FUNDS WITH PRIOR APPROVAL BY VOTE OR APPROVED BUDGET.

C. THE TREASURER SHALL PROVIDE A REPORT OF THE ASSETS AND LIABILITIES OF THE CORPORATION AT ALL REGULAR BOARD OF DIRECTORS AND EXECUTIVE COMMITTEE MEETING.

D. THE TREASURER IS RESPONSIBLE FOR SENDING OUT DUES BILLINGS TO THE MEMBERSHIP WHEN DUE FOR RENEWAL. THE TREASURER IS ALSO RESPONSIBLE FOR THE MAINTENANCE OF DUES BILLINGS FROM THE US J.C.I. SENATE AND WILL ENSURE THE NATIONAL DUES ARE KEPT CURRENT ON ALL STATE DUES PAID.

Roles are Similar to Treasurer of Any Organization

PRESIDENTIAL SWEEPSTAKES

THE PRESIDENTIAL SWEEPSTAKES PROGRAM IS THE LARGEST FUNDRAISER FOR THE US JCI SENATE OUTSIDE OF MEMBERSHIP DUES

SUCCESS OF PROGRAM IS DEPENDENT ON COMMUNICATION AND BENEFITS OF PROGRAM

MEMBERS ARE ENCOURAGED TO DONATE TO THE PROGRAM. ALL TICKETS STUBS ARE INCLUDED IN THE DRAWINGS.

AS STATE TREASURER, YOU WILL INTERACT WITH THE TICKET CHAIRMAN AS YOUR STATE SELLS SWEEPSTAKES TICKETS.

TICKETS - \$10 DONATION OR 6 FOR \$50

STATES AND REGIONS ENCOURAGE TO HOLDING TICKET SALES.

PLEASE REMIT ALL TICKETS AND STUBS TO

Lori Oakland #67100

2100 Meadow Chase Ln, Unit 403

Des Moines, IA 50320

C (515) 681-6018

IF NEED MORE TICKETS CONTACT LORI AT sweepstakes@usjcisenate.org

Success of Fundraiser Dependent on Member Donations

MEMBERSHIP

2026-2027 STATE TREASURER TRAINING

STATE ORGANIZATIONS ARE LIFE BLOOD OF THE US JCI SENATE

STATE TREASURER HAS KEY ROLE IN MEMBERSHIP

WORK CLOSELY WITH YOUR STATE PRESIDENT ... RENEW, GROW, AND REACTIVATE

ANNUAL DUES

ANNUAL DUES TO BE A MEMBER OF THE US JCI SENATE ARE SEVEN DOLLARS (\$7) DUES ARE COLLECTED ON A QUARTERLY BASIS; TO BE **RECEIVED ON OR BEFORE**

SEPTEMBER 1ST

DECEMBER 1ST

MARCH 1ST

INCLUDES DOLLARS TO TREASURER

JUNE 1ST

ROSTER

MEMBERSHIP INFORMATION SERVICES PROGRAM MANAGER STATE ROSTER 45-60 DAYS PRIOR TO END OF QUARTER
THE ROSTER SERVES AS YOUR QUARTERLY UPDATE OF CURRENT MEMBERSHIP THE ROSTER WILL CONTAIN THE FOLLOWING INFORMATION:

SENATOR'S NAME

SENATE NUMBER

ADDRESS

DUE DATE

LIFE MEMBER STATUS

EMAIL ADDRESS

Quarterly Membership of US JCI Senate depends on Timely State Treasurer Submittals

MEMBERSHIP – QUARTERLY DUES KITS

COVER SHEET

COMPLETED COVER SHEET AND ADD-DROP-CHANGE FORM MAILED ALONG WITH A CHECK TO US JCI SENATOR TREASURER, UNLESS USING ZELLE. IT MUST BE RECEIVED BY DUE DATE:

Dawna Norfleet #61999
US JCI Senate Treasurer
3642 Hampton Station Rd
Clarksville, TN 37040

STATE ROSTER

REVIEW THE STATE ROSTER CAREFULLY
HIGHLIGHTED IN YELLOW, INDICATES CHANGE USUALLY ADDRESS CHANGES. BE SURE TO
UPDATE YOUR STATE RECORDS

DUES BILLING FORM

ENTIRE ROSTER WITH THE **CURRENT QUARTER MARKED IN RED**
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, THEN THE MEMBER IS RENEWED

ADD/DROP/CHANGE FORM IS TO BE USED FOR ALL CHANGES I.E., NAMES, ADDRESSES, SENATE NUMBERS, ETC.

HIGHLIGHT THE CHANGES

ELECTRONICALLY SEND IT (ALONG WITH COVER SHEET) BACK TO THE MEMBERSHIP INFORMATION
SERVICES PROGRAM MANAGER

MAY SUBMIT ADDRESS CHANGES USING THE **ADD/DROP/CHANGE FORM** AT ANY TIME DURING YEAR
MEMBERS CAN ONLY BE DROPPED DURING QUARTER DUE...THIS INCLUDES DECEASED SENATORS

Renewals, Adds, Drops Quarterly; Changes of Addresses Anytime

ROSTER

2026-2027 STATE TREASURER TRAINING

ST	REG	DUE	FIRSTNAME	LASTNAME	SENATE	LIFE	ADDRESS	CITY	STATE	ZIP
WA	9	DEC	CAROLYN	AHLGREN	72599		1545 S CHELAN	WENATCHEE	WA	98801
WA	9	DEC	JUDY	BROWN	71539		24019 10TH PL W	BOTHELL	WA	98021
WA	9	DEC	DARRELL W	DAVIS	33062		PO BOX 21511	EUGENE	OR	97402
WA	9	DEC	SUE	DONOHUE-SMITH	58313		302 RIFE DR	ROGERS	AR	72758
WA	9	DEC	DALE	GEHRKE deceased	39835	*	25 BOYER DR	WALLA WALLA	WA	99362
WA	9	DEC	GEORGE	KIVETT	49215	*	PO BOX1233	STANWOOD	WA	98292
WA	9	DEC	LISA	LOUTZENHISER	66604		6339 34 AVE SW #413	SEATTLE	WA	98126
WA	9	DEC	THOMAS	MCAHAN	31032	*	502 STATE STREET	SUMNER	WA	98390
WA	9	DEC	LARRY	OLSON	65767	*	4305 32 AVE W	SEATTLE	WA	98199
WA	9	DEC	DL BUD	SCHIFFLER	9575	*	858 AUTUMN LN	BELLINGHAM	WA	98229
WA	9	DEC	LINDA	SMITH	57328	*	22017 100TH CT S E	KENT	WA	98031
WA	9	DEC	RANDALL	STANDISH	61453	*	1120 15TH AVE #6	SEATTLE	WA	98122
WA	9	JUN	DAVE	AMLIN	34152	*	5609 176 ST SW	LYNNWOOD	WA	98037
WA	9	JUN	EMERSON	BISHOP	7021	*	25605 SE 392	ENUMCLAW	WA	98022
WA	9	JUN	BEV	BRISKEY	58992	*	958 JOHNS RD E	TACOMA	WA	98445
WA	9	JUN	WM MIKE	BROWN	26852		24019 10TH PL W	BOTHELL	WA	98021-8585
WA	9	JUN	AL	BURRAGE	28777	*	2215 46TH AVE SW	SEATTLE	WA	98116
WA	9	JUN	GREGORY	HAMMICH	52568	*	PO BOX 33328	SEATTLE	WA	98133-0328
WA	9	JUN	RICK	HATLEY	41078	*	1004 4TH ST NE	AUBURN	WA	98002
WA	9	JUN	PAM	JAHNKE	60763		912 N 15TH	PASCO	WA	99301
WA	9	JUN	DUNCAN	KIRK	57177	*	15 164TH ST SW #F-1	BOTHELL	WA	98012
WA	9	JUN	LINDA	KURU	60915	*	7514 39TH NE	SEATTLE	WA	98115
WA	9	JUN	BOB	MAIZELS	17670	*	10842 NE 12TH PL	BELLEVUE	WA	98004
WA	9	JUN	MIKE	MCDERMOTT SR	32880	*	PO BOX 727	AUBURN	WA	98002
WA	9	JUN	GARY	OLDFATHER	27958		17693 ROAD 5 NW APT 49	QUINCY	WA	98848-8879
WA	9	JUN	LEISA	POND	65434		16777 SHOLIC ST	VICTORVILLE	CA	92395-9187
WA	9	JUN	WAYNE	SEVERSON	56147		3434 S 144 ST	TUKWILA	WA	98168
WA	9	JUN	ANGIE	STRUTTMANN	64531	*	4810 S M STREET	TACOMA	WA	98408
WA	9	MAR	LANCE	AHLGREN	68705		1545 S CHELAN	WENATCHEE	WA	98801
WA	9	MAR	ED	BARNES	23339		2227 S 284TH PLACE	FEDERAL WAY	WA	98003
WA	9	MAR	STEVE	BOVE	67119		6604 PHILMARK LN	ABERDEEN	WA	98520-7928
WA	9	MAR	DANNY	CLYDE	72954		20106 119TH STREET EAST	BONNEY LAKE	WA	96391
WA	9	MAR	ROBERT	FARMER	72984		2007 QUEEN AVENUE NE	RENTON	WA	98056
WA	9	MAR	KEITH	GAMBLE	39900	*	2728 202ND AVE CT E	SUMNER	WA	98390
WA	9	MAR	JILL	GRIFFIN	67005	*	11319 8TH AVE NE APT 201	SEATTLE	WA	98125-6123
WA	9	MAR	JOE	HESKETH	7707	*	2503 158TH AVE SE	BELLEVUE	WA	98008-5417
WA	9	MAR	DAVID	KONEN	54296	*	PO BOX 657	KENT	WA	98035
WA	9	MAR	MIKE	MCCARTY	71440	*	12520 ROOSEVELT WAY NE # 404	SEATTLE	WA	98125
WA	9	MAR	DON	RODMAN	29738	*	E 4321 GLENNAR DR	SPOKANE	WA	99223
WA	9	MAR	JAMES	SAKAMOTO	60275	*	420 BELLEVUE WAY SE #201	BELLEVUE	WA	98004
WA	9	MAR	JAY	STUMPF	65785		4020 MY ROAD	PASCO	WA	99301
WA	9	MAR	KETRA	STUMPF	65345		4020 MY ROAD	PASCO	WA	99301
WA	9	MAR	LLOYD	TREFRY	12545	*	225 19TH ST NE #28	EAST WENATCHEE	WA	98802
WA	9	MAR	KARYN	TUYRA-VANDECAR	61721	*	1707 W 25TH PL	KENNEWICK	WA	99337
WA	9	MAR	TARA	WINKLER	72174	*	17405 120TH LN SE APT 1202	RENTON	WA	98058
WA	9	SEP	JOHN	BURRAGE	36702	*	905 S 209TH ST	DES MOINES	WA	98198
WA	9	SEP	HAL	DIMOND	11149		4320 S 41ST ST APT 13	TACOMA	WA	98409
WA	9	SEP	DAN	HARRIES	46204		902 9TH STREET	CLARKSTON	WA	99403
WA	9	SEP	BOB	HAVENS	63621	*	19658 NE 179TH ST	WOODINVILLE	WA	98077
WA	9	SEP	BARRY	JENKINS	55358	*	1261 BOYER AVE	WALLA WALLA	WA	99362-2501
WA	9	SEP	JIM	MCDONALD	16113	*	13246 SE 336TH PL	AUBURN	WA	98092
WA	9	SEP	BOB	MCLEAN	46170	*	1217 119 ST S	TACOMA	WA	98444
WA	9	SEP	LES	MILLER deceased	45157	96	5704 TIMBERLINE DR	WEST RICHLAND	WA	99353-8777
WA	9	SEP	JILL	MURRAY	65768	*	7503 210TH ST SW UNIT 13	EDMONDS	WA	98026
WA	9	SEP	ANNMARIE	SPEIRS	61445	*	11815 NE 68TH PL	KIRKLAND	WA	98033-8428
WA	9	SEP	CANDY	STAROWSKI	47959	*	8531 S 124TH ST	SEATTLE	WA	98178
WA	9	SEP	STAROB	STAROWSKI	41472	*	8531 S 124TH ST	SEATTLE	WA	98178
WA	9	SEP	LOUISE	ZEILE	60916	*	PO BOX 15620	SEATTLE	WA	98115-0620

Complete Roster sent Quarterly; Red font indicate Members Due; Yellow highlights means changes noted by MIS program manager

2026-2027 STATE TREASURER TRAINING

Email: 1234JAHUSER@ATT.NET

MEMBER OF ANOTHER STATE	A/D/C	FIRST NAME	LAST NAME	SENATE #	LIFE #	ADDRESS	CITY	STATE	ZIP CODE
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EXPLAIN CHANGES HERE

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US JCI SENATE
QUARTERLY DUES BILLING COVER SHEET - DUES PAYMENT REMITTANCE FORM

Use the enclosed Add/Drop/Change 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 including deceased members.

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

Send completed Cover Sheet and Add/Drop/Change form electronically to the Membership Information Services Program Manager and mail this cover sheet, Add/Drop/Change form and dues payment check for the amount due to the US JCI Senate Treasurer by date listed:

Lisa Badger #67973
Membership Information Services
617 S. 5th Ave E
Newton, IA 50208
Phone (641) 275-0988 (C)
Email: MIS@usjcisenate.org
jcisenator67973@gmail.com

Dawna Norfleet #61999
US JCI Senate Treasurer
3642 Hampton Station Rd
Clarksville, TN 37040
Email: treasurer@usjcisenate.org

☒ First Quarter
September 1, 2026

☐ Second Quarter
December 1, 2026

☐ Third Quarter
March 1, 2027

☐ Fourth Quarter
June 1, 2027

State/Region: TN/7Date: Mailed: 8/12/2026

Person Submitting Dues KitTreasurer

Number of Members Due25

Number of Members Dropped0

Number of Members Renewed25@ \$7.00\$175.00

Number of New Members2@ \$7.00\$14.00

Total Payment due:\$189.00

FOR US JCI SENATE TREASURER'S USE

Check Number:Check Amount:

Date Received:Date Deposited:

PLEASE MAKE CHECKS PAYABLE TO US JCI SENATE

Cover Sheet is sent to Treasurer with Payment

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MEMBERSHIP SUMMARY

AFTER COMPLETING DUES KIT YOU WILL:

ELECTRONICALLY SEND THE MEMBERSHIP KIT BACK TO THE MIS PROGRAM MANAGER:

COMPLETED COVER LETTER & ADD/DROP/FORM

ALL NEW MEMBER INFORMATION LISTED

ALL MEMBERS DROPPED LISTED

ANY ADDRESS CHANGES LISTED

ADD OR UPDATE EMAIL ADDRESS

NOTIFY OF CHANGE FROM MAILED TO ELECTRONIC COPY OF MENTORS

Lisa Badger #67100

Membership Information Services Program Manager

MIS@usjcisenate.org

617 S 5th Ave E

Newton, IA 50208

COVER SHEET:

COMPLETE COVER SHEET AND ADC FORM AND MAIL ALONG WITH CHECK TO US JCI SENATE TREASURER, UNLESS USING ZELLE. IT **MUST BE RECEIVED** BY **DUE DATE**

Dawna Norfleet #61999

US JCI Senate Treasurer

3642 Hampton Station Rd

Clarksville, TN 37040

**Dues kit to MIS Program Manager Electronically;
Dues Kit and Check to Treasurer by due date**

MENTORS

2026-2027 STATE TREASURER TRAINING

- Mentors is an official publication of the US JCI Senate.
- Published/distributed 3 times per Senate year in: September, December, and May
- As State Treasurer, it is important for you to know the following about Mentors:
 1. Mentors is mailed (may be electronic) to every Senator who is a current paid member.
 2. Spouses/dual members preferred to receive as electronic copy. www.usjcisenate.org/index.php/on-line-forms/electronic-mentors
 3. The MIS PM supplies the mailing list thus, **Note: Be sure your state roster is correct!**
- Sponsorships and meeting/event sponsorships and well wishes from senators help cover mentor costs
- States and Regions are encouraged to sponsor an ad for every meeting or event
 1. Staple a sign-up sheet (**Mentors Sponsor Sheet: <http://www.usjcisenate.org/programs/mentors-sponsorsheet/viewdocument/1973>**) 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 the state treasurer you will need to count the money collected and write a check, payable to the **US JCI Senate**, for that amount.
 4. Please use the Mentors Sponsor Sheet to type in the names of attendees (only capitalize the first letter of the first and last names) and email the sign in sheet(s) to the US JCI Business Manager.
- Send the check made out to the **US JCI Senate** along with sign in sheets to the **US JCI Senate Mentors Business Manager**:

Dale Henslee-Smith #55917

Mentors Business Program Manager

Email: mentorsbusmgr@usjcisenate.org Phone: C (803) 238-7652

Mentors Sponsor Ads/Attendance Ads and Payment to Mentor Business Manager

WHAT IS AN OUTSTANDING TREASURER?

1. Attends State Treasurer training hosted by the US JCI Senate and attends Treasurer Information Exchange meetings at US JCI Senate BOD meetings
2. Prepares a budget for your state (and submit to US JCI Senate Treasurer)
3. Deposits receipts in timely manner and pay bills in a timely manner
4. Ensure dues kits are returned to US JCI Senate in a timely manner. Send out dues billing renewals form and include a letter from your State President 8-10 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). Provides a pre-addressed envelope with the letter in order to make it effortless for them to renew! Follow-up with other communication (email, phone calls, etc.).
5. Ensures your state organization remains solvent and provide a budget/actual to date written reports to your state membership periodically (and submit to US JCI Senate Treasurer)
6. Develops some sort of receipt voucher process (**Check Request Form**) for documentation and require receipts.
7. Ensures controls are in place to maintain the integrity of the financial situation of your state.
8. Keeps good documentation.
9. Files necessary forms as required by laws and regulations.
10. Supports the state growth in membership and reactivation of past members
11. Supports your state president, other officers and state organization, as necessary.

Be a good steward and fiscally knowledgeable about your State Finances

RECAP AND REMARKS

STATE TREASURER TRAINING ON WEBSITE JULY 1

WILL RECEIVE YOUR FIRST DUES KIT – BY JULY 15

DUE BACK WITH PAYMENT TO TREASURER BY SEPTEMBER 1

**IF YOU NEED HELP, YOU KNOW THE SUBJECT MATTER EXPERTS,
READY TO SUPPORT**

US JCI Senate Treasurer and his Team will support and help you, as needed.