

Moose International, Inc.

Job Description

Job Title:	Financial Review Specialist
Department:	Membership
Reports to:	Assistant Director, Lodge Development
FLSA Status:	Exempt

GENERAL SUMMARY:

A specialized position with the principle responsibility to perform more complex analysis and support of Moose Lodges which are identified as having major challenges within their fraternal and/or business operations. He/she will conduct onsite and/or remote evaluations of operations and take necessary steps to move the identified lodge back on the path of fraternal and fiscal success. When not on assignment, he/she will assist in the evaluation of lodge reports, both operational and fraternal, and recommend a specific course of action to be taken by assigned, local field staff members. Further, Financial Review Specialists may also assist in training of various field staff employees, volunteers and others who may interact with Moose lodges, as well as temporarily perform essential job functions associated with the Territory Manager role in understaffed or unstaffed territories as necessary.

ESSENTIAL FUNCTIONS:

- Communicates with Moose Membership Department Management Team, and both Regional and Territory Managers, to identify lodges that have financial and/or operational issues outside the normal scope of management operation problems that can typically be solved via occasional visits by field staff employees and volunteers.
- Interacts with Regional/Territory Managers, Lodge officers, members and staff to quantify and qualify specific fraternal/operational issues that are impacting the lodge's ability to operate effectively, then moderates discussion with all parties in an effort to resolve identified issues.
- Provides immediate individualized training in areas identified as a critical deficiency and recommends appropriate training through other resources for areas of routine operations.
- Performs extensive examination of books and records of assigned Lodges and makes recommendations on: improvements to recordkeeping; business operation changes; officer realignment; and the development and implementation of programs to maximize Lodge membership and profitability in every business segment in which a Lodge is involved.
- Emphasizes extensive knowledge of QuickBooks Online, including the use of the software, the ability to train others to use the software, the correction of entries, and the ability to adjust the Balance Sheet and Profit & Loss statements, to coincide with accurate reporting and tax filing requirements.
- Monitors and evaluates reports provided by Moose International to actively track progress of the Lodges within identified regions; makes recommendations and

suggestions to Regional and Territory Managers based on information contained in reports.

- When on assignment, reviews duties of the Board of Officers and the Auditing Committee with the committee's members of the assigned Lodge, and provides training as necessary.
- Provides onsite training support for new and established Territory Managers in business, financial and territory management, including: pricing of food and beverage operations; retention and recovery methods; officer training and/or reorganization; house committees; QuickBooks on Line applications; reporting; and other areas as needed.
- Provides temporary coverage support as requested for unstaffed or understaffed territories of the Fraternity.
- Communicates all findings, recommendations and progress reports to appropriate Moose International staff, Lodge Officers and other support personnel within established timelines. Maintaining confidentiality and sharing financial information only with those authorized individuals entitled to receive such information.

SECONDARY JOB FUNCTIONS:

- Interacts with various creditors, regulators and vendors in determining assigned lodges' status with financial obligations.
- Testifies in criminal, civil and/or fraternal judicial proceedings as required.
- Perform financial reviews of chapters and Moose Legions when assigned; and to copy the report findings and recommendations to Women of the Moose International headquarters' and/or respectfully to Director of Higher Degrees at Moose International.
- Other duties as assigned.

DEPARTMENT GOALS:

- Develop capable leadership teams for each Lodge within an assigned territory.
- Improve fraternal and business operations primarily within assigned Lodges and secondarily organization wide.
- Aid in increasing Active Members, primarily in assigned Lodges and secondarily within The Moose as a whole.
- Decrease outstanding indebtedness of assigned Lodges to Moose International.
- Increase Lodge giving by assigned Lodges in support of Moose Charities.
- Increase number and quality of fraternal programs and community service efforts for each Lodge within an assigned territory.
- Identify, recruit and train qualified volunteers to support the paid staff in the achievement of departmental goals.

INTERNAL INTERACTIONS:

- Membership Department Staff Management – weekly to as needed.

- Regional or Territory Managers – often, as needed.
- Office of Compliance Staff – as needed.
- Other Department Directors and Staff – as needed.

EXTERNAL INTERACTIONS:

- Moose Lodges, their Officers and members – daily.
- Moose Associations – as needed.
- Banking/Financial Services Representatives – as needed.
- Realtors and related professionals – as needed.
- Vendors supplying Lodges in assigned territory – as needed.
- Governmental investigative, regulatory and taxation representatives – as needed.
- Judicial bodies and representatives – as needed.

MINIMUM REQUIREMENTS

- High school diploma or equivalent, some college preferred.
- Experience using personal computers utilizing a Microsoft Windows operating system, MSOffice Suite, and Internet Explorer.
- Experience writing comprehensive reports and observations.
- Strong comprehensive knowledge and ability to use QuickBooks on Line or QuickBooks programs, and the skills to teach others the proper utilization of this software.
- Prior management experience, preferably in Lodge, food and beverage, or other hospitality-related environment.
- Strong organizational and interpersonal communication skills.
- Ability to routinely manage multiple tasks simultaneously, to quickly adapt to changing situations and to solve problems with minimal supervisor intervention.
- Ability to work both independently and cooperatively within a team environment.
- Use of a personal vehicle; a valid driver's license, a good driving record, and the ability to drive in daylight or nighttime.
- Able to work away from home as necessary, occasionally up to several weeks at a time.

KNOWLEDGE, SKILLS AND ABILITIES

- Self-motivated and results oriented.
- Effectively expresses ideas and facts in a succinct, organized manner.
- Makes clear and convincing oral presentations.
- Considers and responds appropriately to ideas and thoughts expressed by others.

- Ability to persuade others, gain cooperation, and influence outcomes as well as foster commitment and team spirit.
- Adaptable to new information and ideas, changing conditions, unexpected obstacles and different leadership styles.
- Detailed and comprehensive knowledge of The Moose fraternal organization—its structure, leadership, history, rules, new lodge/chapter/service center policies and procedures, and formal/informal relationships within Moose International, Inc. and its subsidiaries and related organizations, or the ability to develop this knowledge quickly.
- Experience in collection of delinquent debts.
- If assigned to a region outside the U.S., a valid passport and the ability to travel outside the country

WORKING CONDITIONS:

- Frequent travel by car; travel by watercraft or aircraft in a variety of weather conditions required on occasion.
- Moose Lodge work locations include offices and work areas typical of a food and beverage establishment, which can be in multi-story buildings and may not have an elevator.
- Able to carry approximately 20 pounds of computer equipment and other work supplies over a variety of possibly uneven surfaces, up and down stairs or inclines, for distances typically under 100 yards.
- Additional assignments in hotel/convention center-type venues.

This job description in no way states or implies that these are the only duties to be performed by the jobholder. He/she will be required to follow other instructions or perform other duties as requested by his/her supervisor or manager. Essential duties may change.