

Lodge Officer Duty Comparison Job Aid




Purpose –

This job aid has been created to help Lodge Officers and General Members quickly compare and contrast primary Officer responsibilities within the Lodge environment.


This job aid has been designed to supplement the General Laws. Content provided herein does not replace the General Laws in any way.

Moose Training


August/2014 Content Disclaimer – this document has been updated in line with the 2014 General Law changes. Lodges operating with seven Officers (or one Trustee) should be aware that the Prelate and the Jr. Governor are accountable for assisting with the Trustee tasks cited herein.

TASK CATEGORY	GOVERNOR ROLE	JR. GOVERNOR ROLE	Jr. Past Gov. Role	ADMINISTRATOR ROLE
Communications 				
1. Email				Check, and respond to, daily
2. Websites	Appoint Communications Committee Chairman			Check for updates from Moose Int'l; Give input for Lodge website updates
3. Officer Status	Corporate President; Appoint non-voting officers; Maintain effective officers	Corporate Vice President	Install officers	Corporate Secretary Enter current officers online; Update Articles of Incorporation per state requirements
4. Membership	Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor; Enter/update applications, member data, and enrollment date; Transmit daily
5. Business Reports	Request report(s)			Create membership reports (LCL.net); Create QB reports (as needed); Read official reports from Moose Int'l; Attach reports to meeting minutes
6. Lodge Legal Documents	Co-sign			Sign and file


TREASURER ROLE	PRELATE ROLE	TRUSTEE ROLE	APPT'D OFFICERS ROLE	SQ MANAGER ROLE	RECOMMENDED RESOURCES
					'How to Access Your Mooseunits Email'; Moose International Help Desk
					Communications Committee
Corporate Treasurer					Online Admin Menu; Articles of Incorporation website
Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor	General Laws; www.mooseintl.org [Membership]; [LCL Resource Manual]; LCL.net
Request Report(s)	Audit				LCL Reports; QB Reports; Emailed Reports from Moose Int'l
Co-sign	Audit				Any Legal Document

TASK CATEGORY	GOVERNOR ROLE	JR. GOVERNOR ROLE	Jr. Past Gov. Role	ADMINISTRATOR ROLE
Meetings 				
1. Meeting Agendas	Give input			Prepare
2. Officer Meetings - 2/month - quorum = 5 - quorum = 4 for 7-Officer Board	Preside #1; Report; Sign minutes	Attend; Report; Preside #2	Attend; Report; Preside #4	Schedule and attend; Report (official communications, application review committee report, etc.); Record, sign, store minutes
3. Membership Meetings - 2/month; - quorum = 7	Preside #1; Report; Sign minutes; Refer 'new business' to Officer meeting	Attend; Preside #2	Attend; Preside #4	Schedule and attend; Report (e.g. official communications, favorable applications for vote; bills for vote, etc.); Record, sign, store minutes
4. House Committee Meetings - 2/month - quorum = 5 - quorum = 4 for 7-Officer Board	Preside #1 (Chair); Report; Sign minutes; Approve SQ rules	Attend (Member); Preside #2; Approve SQ rules	Attend (Member); Preside #4; Approve SQ rules	Schedule and attend (Secretary); Report (e.g., monthly HC and P&L); Record, sign, store minutes; Approve SQ rules
5. Joint Meetings - 1/month - quorum = 7	Preside #1; Report; Sign minutes; Approve SQ rules	Attend; Preside #2	Attend; Preside #4	Schedule and attend; Report; Record, sign, store minutes
6. Special Meetings (as needed)	Call/Preside #1 as needed: (Real estate transactions, enrollments, installations, dues change, etc.)	Attend; Preside #2	Attend; Preside #4	Schedule, mail/post date; Attend; Report; Record, sign, store minutes



TREASURER ROLE	PRELATE ROLE	TRUSTEE ROLE	APPT'D OFFICERS ROLE	SQ MANAGER ROLE	RECOMMENDED RESOURCES
					Officers' & Committeemen's Handbook (O&CH); Minutes (white pgs); Lodge Handbook;
Attend; Report	Attend; Pray; Preside #3; Report (sick and distressed)	Attend; Report (bills to pay)	Prepare room; Introduce/seat guests		O&CH; Minutes (white pgs); \$ Reports; Bills; Committee Reports: Applications Review, Activities, Community Service
Attend; Report	Attend; Preside #3; Pray; Report (sick); Tribute of Service		Prepare room; Introduce/seat guests		O&CH; Minutes (white pgs); Lodge Handbook; Applications for vote; Bills for vote; Financial Reports
Attend (Treasurer); Approve SQ rules	Attend (Member); Preside #3; Pray; Approve SQ rules	Attend (Trustees); Approve SQ rules	Prepare room; Introduce/seat guests	Attend if/when requested by Officers	O&CH; Minutes (gold pgs); Weekly Envelope; Bills; P&L Report; HC Report; SQ Incident Report
Attend	Attend; Preside #3; Pray	Attend	Prepare room; Introduce/seat guests		O&CH; Minutes (white pgs); Lodge Handbook; Lodge Calendar
Attend	Attend; Preside #3 Pray	Attend	Prepare room; Introduce/seat guests		Minutes (white pgs); General Governor/Checklists; Applicant Report; LCL-Accepted Mssg; Lodge Calendar; Dues Chg Approval

TASK CATEGORY	GOVERNOR ROLE	JR. GOVERNOR ROLE	Jr. Past Gov. Role	ADMINISTRATOR ROLE
Meetings (cont.) 				
7. Standing Committee Meetings - monthly	Appoint Chairmen and Election Committee; Serve (except Election and Audit)			Collect committee income; Deposit committee funds in general lodge fund
8. Special Committee Meetings - monthly, or as needed	Serve on Moose of the Year Committee		Chair Moose of the Year Committee	
9. Audit Committee Meetings - monthly	Request records for audit; Request any special audit/meeting			Provide all records/reports for Lodge audits
10. Nominating Committee Meetings	Preside #1	Attend; Preside #2	Attend' Preside #4	Schedule meeting; Attend; Record, sign, store minutes; Compile/attach nominee list to minutes
11. Election Committee Meetings	Appoint; Respond to questions; Obtain Election Results Report			Attach Election Results Report to Lodge meeting minutes
12. Territory, State/Provincial, Association, and Annual Convention Meetings	Attend; Submit meeting report to Lodge			Attend; Make Official Visitor plans and travel arrangements; Enter related bills/expenses in QB


TREASURER ROLE	PRELATE ROLE	TRUSTEE ROLE	APPT'D OFFICERS ROLE	SQ MANAGER ROLE	RECOMMENDED RESOURCES
		Serve on Loss Prevention committee; Chair (1 Year Trustee)			O&CH; Minutes (Binder); General Laws; Committee Reference Sheets
					Moose Int'l Lodge Operations for Moose of Year nomination forms
	Serve; Review financial & membership records; Verify officer duties performed				Audit Committee Guidelines; Previous month audit file/report; Bank statements; Reconciliation reports
Attend	Attend; Preside #3	Attend			Lodge Election Handbook; Sample Nomination Petition/Ballot; Sample Report of the Nominating Committee
					Lodge Election Handbook; Active Member Report; Ballot/ballot box; Results Report
					www.mooseintl.org; State/Provincial website; Moose Magazine

TASK CATEGORY	GOVERNOR ROLE	JR. GOVERNOR ROLE	Jr. Past Gov. Role	ADMINISTRATOR ROLE
Safety & Security 				
1. Keys	Know where keys are			Lock building, stockrooms, ATM, or anything else containing cash or cash value
2. Private Policy	Know/Adhere to	Know/Adhere to	Know/Adhere to	Know/Adhere to <i>See SQ Manager if also SQ Manager</i>
3. Decorum	Prepare, Enforce, Maintain Rules; Investigate Breach	Prepare, Enforce, Maintain Rule; Investigate Breach	Prepare, Enforce, Maintain Rules; Investigate Breach	Prepare, Enforce, Maintain, Rules; Investigate Breach; <i>See SQ Manager if also SQ Manager</i>
4. Social Quarters Incident Report(s)				<i>See SQ Manager if also SQ Manager</i>
5. Safety Inspections	Follow up on any safety or hazard issues			Attach Safety Inspection form to minutes; Hire/pay service repair Contractor; Ensure Lodge maintained to code
6. Inventory				Recommend bill payment for new/repaired inventory (e.g., computer, furniture, etc.); Purchase new/repaired inventor


TREASURER ROLE	PRELATE ROLE	TRUSTEE ROLE	APPT'D OFFICERS ROLE	SQ MANAGER ROLE	RECOMMENDED RESOURCES
					Locksmith
Know/Adhere to	Know/Adhere to	Know/Adhere to	Know/Adhere to	Know/Adhere to; Check cards; Provide guest IDs; Post rules	General Laws; Guest Book/Badges Signage; LCL.net 'Active Member' list
Prepare, Enforce, Maintain Rules; Investigate Breach	Prepare, Enforce, Maintain Rules; Investigate Breach	Prepare, Enforce, Maintain Rules; Investigate Breach	Enforce & Maintain	Enforce & Maintain; Remove for misconduct; Escalate if necessary	General Laws; SQ Incident Log; Emergency #s
	Audit			Train Bartenders on Report usage	SQ Incident Report Log
	Audit	Semi-annual safety inspections to Moose Int'l; Notify Officers of hazards and correct		Ensure medical equipment on hand; Train staff on emergency procedures	Safety Inspection Form; Corrective Action Plan
	Audit	Take/report monthly inventory; Report any safety issues @ Officer meeting			Furniture; Medical attention equipment; Accessibility

TASK CATEGORY	GOVERNOR ROLE	JR. GOVERNOR ROLE	Jr. Past Gov. Role	ADMINISTRATOR ROLE
Safety & Security (cont.) 				
7. Insurance				Maintain policies/pay premium: - Risk Pool to Moose Int'l - Fire, Theft, Property, Hall Rental - Workers Comp; Submit/Follow-up on claims
8. Local, County, and State Permits				Apply for / maintain permits/licenses: - Food/beverage license - Entertainment license - Bingo/Gaming license - Health Food permit - Other local, state, or federal
9. Training	Complete Leadership training; Attend Governors Workshop and TiPS training	Complete Leadership training; Attend Governors Workshop and TiPS training	Complete Leadership training; Attend Governors Workshop and TiPS training	Complete required Leadership training, 2-HOTT training, and Admin school training; Enter/Pay training bills; <i>See SQ Manager if also SQ Manager</i>
Finances 				
1. Budget	Give input	Give input	Give input	Create, communicate, review monthly/quarterly budget; Analyze budget trends; Report budget updates
2. Register Banks	Witness drawer count (if necessary)			Issue receipts to SQ Manager for all SQ funds collected; file in weekly envelope; Witness drawer counts; <i>See SQ Manager if also SQ Manager</i>

TREASURER ROLE	PRELATE ROLE	TRUSTEE ROLE	APPT'D OFFICERS ROLE	SQ MANAGER ROLE	RECOMMENDED RESOURCES
	Audit				Statement of Accounts (Risk Pool) Insurance Reference Manual
	Audit				Websites: - City/Town; - State Dept of Reve; - www.irs.gov Gov Relations Committee
Complete: Leadership training, Treas. & Audit Comm workshop, and TiPS training	Complete: Leadership training, and TiPS training	Complete: Leadership training, Trustees workshop, and TiPS training		Attend TiPS training; Ensure staff is TiPS recertified every 3 years	www.gettips.com ;
Give input	Give input	Give input			QB Budget Feature; QB Monthly/Year End Detailed Reports; Committee Chairmen
				Train Bartenders on register use	Register Banks; ATM Machine; Petty Cash; Triplicate House Receipts

TASK CATEGORY	GOVERNOR ROLE	JR. GOVERNOR ROLE	Jr. Past Gov. Role	ADMINISTRATOR ROLE
Finance (cont.) 				
3. House Committee Weekly Envelope				Witness SQ weekly envelope count; Sign Weekly Envelope; Issue House Committee receipts; Calculate sales tax for sales receipts; Enter sales receipts in QB; Make weekly deposit at bank & in QB Prepare Lodge Reimbursement check
4. Sales & Dues Receipts				Issues receipts; Enter sales receipts in QB; Calculate sales tax for sales receipts; Enter dues receipts in QB
5. Deposits				Make weekly deposits at bank and in QB; Maintain duplicate deposit slips
6. Inventory	Stay informed on inventory sales/gross profit	Stay informed on inventory sales/gross profit	Stay informed on inventory sales/gross profit	Order inventory as needed; Enter inventory bills in QB (COGS); Adjust post-sales inventory in QB; Track monthly sales/gross profit; <i>See SQ Manager if also SQ Manager</i>
7. Bills	Sign approved checks; Examine/make recommendation for payment	Give input for payment	Give input for payment	Enter all bills in QB (recurring, non-recurring, Moose Int'l Statement of Accounts and Endowment fund remittance); Pay bills (in QB also)
8. Bank Accounts				Ensure accuracy of bank signature cards; Enter daily/weekly transactions in QB; Reconcile all cash accounts monthly;

TREASURER ROLE	PRELATE ROLE	TRUSTEE ROLE	APPT'D OFFICERS ROLE	SQ MANAGER ROLE	RECOMMENDED RESOURCES
Inspect HC finances weekly	Audit			Take/clear register tape w/HC Officer; File in weekly envelope;	O&CH; Weekly Envelope
Inspect for current/accurate weekly receipt records	Audit				www.mooseintl.org Moose Training Online Job Aid How to View Receipts/Deposits in QuickBooks
Initial duplicate weekly deposit slip; Inspect for current/accurate weekly deposits	Audit				www.mooseintl.org Moose Training Online Job Aid How to View Receipts/Deposits in QuickBooks
	Audit	Conduct monthly inventory (SQ, Lodge, bingo, gaming)		Recommend order quantities; changes to routinely stocked items (per feedback)	www.mooseintl.org Moose Training Online Job Aid How to Adjust Inventory in QuickBooks
Sign authorized checks; Inspect for current/ accurate weekly bill payments	Audit	Examine/approve weekly bills; Initial recommended bills for payment			Recurring/non-recurring bills; MI Statement of Accounts; How to Verify Proper Bill Entry in QuickBooks
	Audit				

TASK CATEGORY	GOVERNOR ROLE	JR. GOVERNOR ROLE	Jr. Past Gov. Role	ADMINISTRATOR ROLE
Finances (cont.) 				
9. Financial Reports - Transmits & Audits	Ensure monthly reports are transmitted on time			Create monthly reports; Transmit monthly reports to Moose Int'l by the 10 th of every month; Print monthly reports for audit file
10. Payroll	Name/employ, SQ Manager; Budge for, and approve, wages for all employees	Name/employ, SQ Manager; Budget for, and approve, wages for all employees	Name/employ, SQ Manager; Budge for, and approve, wages for all employees	Name/employ SQ Manager; Budget for, and approve wages; Interview/hire clerical support; Create/maintain employee file; Pay Lodge employees & payroll taxes; Send all tax forms out by due dates
11. Local/State Taxes/Forms	Ensure any local/state taxes are paid on time			Pay real estate/personal property tax; Pay state sales tax (monthly/quarterly); Pay withheld state tax
12. Federal Taxes/Forms	Ensure all IRS tax forms are filed on time			Pay quarterly 940/940EZ FUTA; File quarterly 941 Employers Return; File annual 990 (on/before 9/15); File by 2/28: W-3 & W-2 Copy A, 1099-MISC Copy A, 1099-INT Copy A, and Form 1096
13. Gaming Taxes/Forms	Ensure any gaming tax forms are filed on time			Send W-2G to recipients by 1/31; Mail 1099-MISC Copy B to non-employee recipients by 1/31; Mail 1099-INT Copy B to recipients by 1/31

TREASURER ROLE	PRELATE ROLE	TRUSTEE ROLE	APPT'D OFFICERS ROLE	SQ MANAGER ROLE	RECOMMENDED RESOURCES
	Audit				QB Reconciliation Report; Bank Statements; LCL.net Monthly Reports
Name/employ, SQ Manager; Budget for, and approve, wages for all employees	Name/employ, SQ Manager; Budget for, and approve, wages for all employees; Ensure employee file(s) exist	Name/employ, SQ Manager; Approve wages for all employees		Hire, fire and set wages of employees as delegated by the House Committee	Employee File(s); Previous Year Taxes; www.irs.gov
	Audit				Previous Year Taxes; www.irs.gov; Real Estate/Property Tax bills; Sales Tax Calculator; Dept. of Revenue; Local Ordinances
	Audit				Previous Year Taxes; www.irs.gov; 990 Help Files
	Audit				Previous Year Tax Folder www.irs.gov; 990 Help Files
	Audit				

HELPFUL LINKS OR ACCESS PATH TABLE:

Resource	Link / Access Path
990 Help Files	http://www.mooseintl.org/portal/news/IRS990.asp
Active Member Report (LCL.net)	LCL.net login / Go To / Reports and Labels
Admin Menu (or 'Online MMMS Menu')	https://secure.mooseintl.org/FRUAdmin/
Application	http://www.mooseintl.org/members/wp-content/uploads/sites/2/2014/06/MembershipApplication_English.pdf
Articles of Incorporation web help	http://www.coordinatedlegal.com/SecretaryOfState and/or sherrmann@mooseintl.org
Audit Committee Guidelines	http://www.mooseintl.org/portal/pdf/FratEd/AuditCommitteeGuidelinesforFraternalUnits.pdf
Daily Transmits	LCL.net login / Go To / Application Transmit [followed by Go To / Daily Transmit]
Moose Training website	http://www.mooseintl.org/members/index.php/moose-training/
Moose Training Course Descriptions	http://www.mooseintl.org/members/index.php/moose-training/
General Laws	http://www.mooseintl.org/members/wp-content/uploads/sites/2/2014/06/General-Laws.pdf
Help Desk (Moose International)	helpdesk@mooseintl.org or 630-906-3658
How to Access Your Mooseunits Email	http://www.mooseintl.org/portal/pdf/FratEd/HowToAccessMooseunitsEmail.pdf
How to Enter Officers (Online)	http://www.mooseintl.org/portal/FraternalEducation/Demos/OfficerEntry_demo/Officer%20Entry_demo.htm
Insurance Reference Manual	http://www.mooseintl.org/members/wp-content/uploads/sites/2/2014/07/Insurance-Reference-Manual.pdf
Inventory Chart	http://www.mooseintl.org/portal/pdf/FratEd/InventoryChart.xls
LCL.net Resource Manual	http://www.mooseintl.org/portal/pdf/FratEd/LCL_ResourceManualForFraternalUnits.pdf
LCL.net Reports	LCL.net login / Go To / Reports and Labels / [Choose report type as desired]
Lodge By-Laws (copy)	http://www.mooseintl.org/members/index.php/moose-contacts/ or sgreene@mooseintl.org
Lodge Election Handbook	http://www.mooseintl.org/members/wp-content/uploads/sites/2/2014/06/LodgeElectionHandbook1.pdf
Lodge Handbook	http://www.mooseintl.org/members/wp-content/uploads/sites/2/2014/06/LodgeRitualHandbook_ML.pdf
Minutes – Administrator Binder	http://www.mooseintl.org/supply/detail.aspx?ID=65
Minutes – Lodge Minutes Sheets	http://www.mooseintl.org/supply/detail.aspx?ID=66
Minutes – House Committee Sheets	http://www.mooseintl.org/supply/detail.aspx?ID=68
Monthly Reports (Balance Sheet and P&L)	LCL.net login / Monthly Reports / [Create, or click dated report from dropdown and then Create]
Moose Magazine (online)	http://www.mooseintl.org/members/index.php/moose-magazine-online1/
Officers' & Committeemen's Handbook	http://www.mooseintl.org/portal/pdf/FratEd/OfficerAndCommitteemenHandbook.pdf
Official Administrator's Manual	http://www.mooseintl.org/portal/pdf/FratEd/OfficeAdministratorManual.pdf
QuickBooks Pro 2007 Resource Manual	http://www.mooseintl.org/portal/pdf/FratEd/Quickbooks2007ResourceManual.pdf
Safety Inspection Form	http://www.mooseintl.org/members/wp-content/uploads/2014/08/Lodge-Safety-Inspection-Form.pdf
Sales Tax Calculator	http://www.mooseintl.org/members/index.php/virtual-classroom/
Social Quarters Incident Report Log Book	For additional copies, contact Cynthia Traynor in the Risk Management Department at ctraynor@mooseintl.org or 630-859-6619.
TiPS Training (Alcohol Server Training)	www.gettips.com
Unit Website	Contact Teresa Ehlert at tehlert@mooseintl.org
Weekly Envelope (House Committee)	How to use the envelope: http://www.mooseintl.org/portal/LodgeOps/Video/story.html Where to purchase the envelope: http://www.mooseintl.org/supply/detail.aspx?ID=76