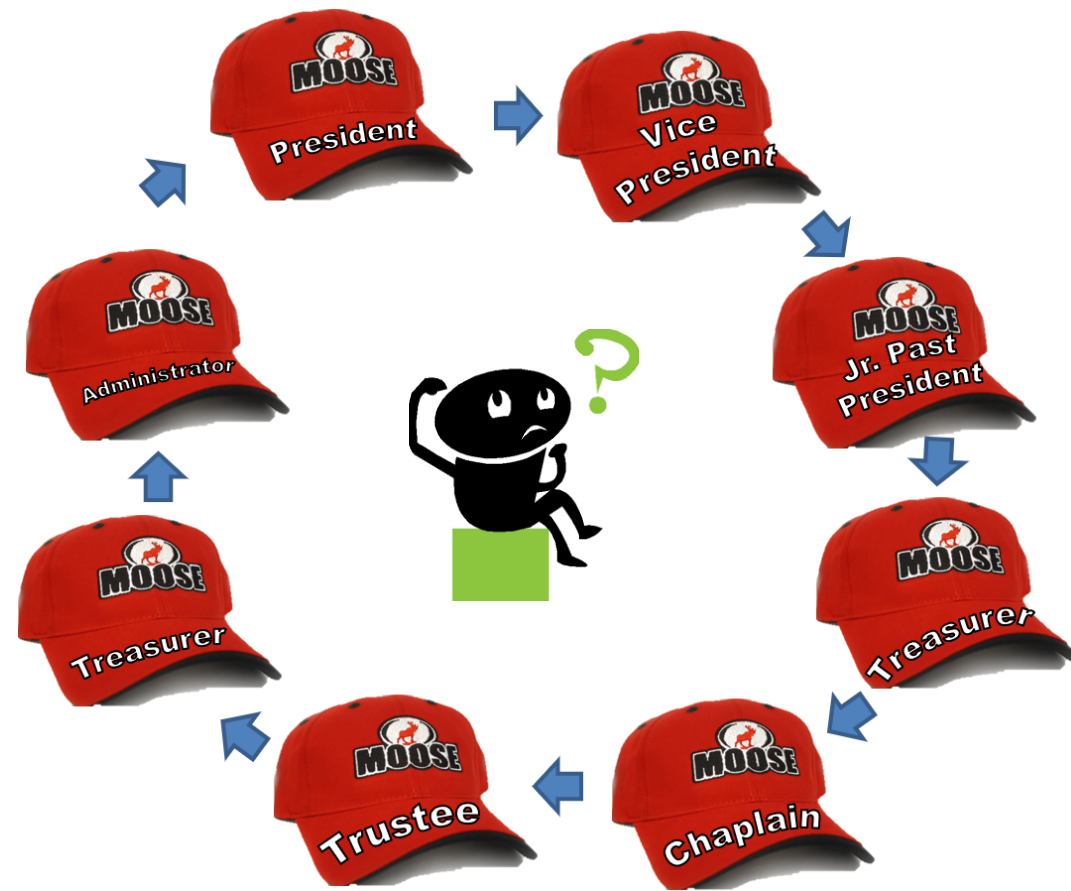


Lodge Officer Duty Comparison Job Aid



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.


May 2021 – this document has been further updated in line with the 2021 General Law changes to create a new and unified Moose membership where all members, male and female, have equal opportunities, rights and privileges within the lodge. The vote also included title changes and the elimination of the House Committee.


TASK CATEGORY	PRESIDENT ROLE	VICE PRESIDENT ROLE	Jr. Past Pres. Role	ADMINISTRATOR ROLE	TREASURER ROLE	CHAPLAIN ROLE	TRUSTEE ROLE	APPT'D OFFICERS ROLE	SQ MANAGER ROLE	RECOMMENDED RESOURCES
Communications 										
1. Email				Check, and respond to, daily						'How to Access Your Mooseunits Email'; Moose International Help Desk
2. Websites	Appoint Communications Committee Chairman			Check for updates from Moose Int'l; Give input for Lodge website updates						Communications Committee
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	Corporate Treasurer					LCL. Web; Articles of Incorporation website
4. Membership	Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor; Enter/update applications, member data, and enrollment date; Transmit daily	Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor	Retain, build, sponsor	General Laws; www.mooseintl.org [Membership]; [LCL Web Manual]; LCL.Web
5. Business Reports	Request report(s)			Create membership reports (LCL.web); Create QBO reports (as needed); Read official reports from Moose Int'l; Attach reports to meeting minutes	Request Report(s)	Financial Review				LCL Reports; QBO Reports; Emailed Reports from Moose Int'l
6. Lodge Legal Documents	Co-sign			Sign and file	Co-sign	Financial Review				Any Legal Document


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Meetings 										
1. Meeting Agendas	Give input			Prepare						Officers' & Committeemen's Handbook (O&CH); Minutes (white pgs); Lodge Handbook;
2. Officer Meetings - 2/month - quorum = 5 - quorum = 4 for 7-Officer Board	Preside #1; Report; Sign minutes	Attend; Report; Preside #2	Attend/Advise; Report; Preside #4	Schedule and attend; Report (official communications, application review committee report, etc.); Record, sign, store minutes	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
3. Membership Meetings - 2/month; - quorum = 7	Preside #1; Report; Sign minutes; Refer 'new business' to Officer meeting	Attend; Preside #2	Attend/Advise; Preside #4	Schedule and attend; Report (e.g. official communications, favorable applications for vote; bills for vote, etc.); Record, sign, store minutes	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
6. Special Meetings (as needed)	Call/Preside #1 as needed: (Real estate transactions, enrollments, installations, dues change, etc.)	Attend; Preside #2	Attend/Advise; Preside #4	Schedule, mail/post date; Attend; Report; Record, sign, store minutes	Attend	Attend; Preside #3 Pray	Attend	Prepare room; Introduce/seat guests		Minutes (white pgs); Chief Compliance Officer/Checklists; Applicant Report; LCL-Accepted Mssg; Lodge Calendar; Dues Chg Approval

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Meetings (cont.) 										
7. Standing Committee Meetings - monthly	Appoint Chairmen and Election Committee; Serve (except Election and Financial Review)			Collect committee income; Deposit committee funds in general lodge fund			Serve on Loss Prevention committee; Chair (1 Year Trustee)			O&CH; Minutes (Binder); General Laws; Committee Reference Sheets
8. Special Committee Meetings - monthly, or as needed	Serve on Moose of the Year Committee		Chair Moose of the Year Committee							Moose Int'l Lodge Operations for Moose of Year nomination forms
9. Financial Review Committee Meetings - monthly	Request records for financial review; Request any special financial review/meeting			Provide all records/reports for Lodge financial reviews		Serve; Review financial & membership records; Verify officer duties performed				Financial Review Committee Guidelines; Previous month financial review file/report; Bank statements; Reconciliation reports
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	Attend	Attend; Preside #3	Attend			Lodge Election Handbook; Sample Nomination Petition/Ballot; Sample Report of the Nominating Committee
11. Election Committee Meetings	Appoint; Respond to questions; Obtain Election Results Report			Attach Election Results Report to Lodge meeting minutes						Lodge Election Handbook; Active Member Report; Ballot/ballot box; Results Report
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 QBO						www.mooseintl.org; State/Provincial website; Moose Magazine

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Safety & Security 										
1. Keys	Know where keys are			Lock building, stockrooms, ATM, or anything else containing cash or cash value						Locksmith
2. Private Policy	Know/Adhere to	Know/Adhere to	Know/Adhere to	Know/Adhere to <i>See SQ Manager if also SQ Manager</i>	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.Web 'Active Member' list
3. Decorum	Prepare, Enforce, Maintain Rules; Investigate Breach	Prepare, Enforce, Maintain Rules; Investigate Breach	Prepare, Enforce, Maintain Rules; Investigate Breach	Prepare, Enforce, Maintain, Rules; Investigate Breach; <i>See SQ Manager if also SQ Manager</i>	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
4. Social Quarters Incident Report(s)				<i>See SQ Manager if also SQ Manager</i>		Financial Review			Train Bartenders on Report usage	SQ Incident Report Log
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		Financial Review	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
6. Inventory				Recommend bill payment for new/repared inventory (e.g., computer, furniture, etc.); Purchase new/repared inventor		Financial Review	Take/report monthly inventory; Report any safety issues @ Officer meeting			Furniture; Medical attention equipment; Accessibility

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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		Financial Review				Risk Pool Balance: LCL. Web [Fraternity>Pay A/R Statement]; Insurance Reference Manual
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		Financial Review				Websites: - City/Town - State Dept. of Revenue - www.irs.gov Gov Relations Committee
9. Training	Complete Leadership training; Attend TiPS training	Complete Leadership training; Attend TiPS training	Complete Leadership training; Attend TiPS training	Complete Leadership training, 2-HOTT (QBO/LCL) training, and Admin school training; Enter/Pay training bills; <i>See SQ Manager if also SQ Manager</i>	Complete: Leadership training, and TiPS training	Complete: Leadership training, and TiPS training	Complete: Leadership training, and TiPS training		Attend TiPS training; Ensure staff is TiPS recertified every 3 years	www.gettips.com ; www.mooseintl.org
Finances 										
1. Budget	Give input	Give input	Give input	Create, communicate, review monthly/quarterly budget; Analyze budget trends; Report budget updates	Give input	Give input	Give input			QBO Budget Feature; QBO Monthly/Year End Detailed Reports; Committee Chairmen
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>					Train Bartenders on register use Moose Training - Server Training	Register Banks; ATM Machine; Petty Cash; Triplicate House Receipts

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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 QBO; Make weekly deposit at bank & in QBO	Inspect HC finances weekly	Financial Review			Take/clear register tape w/HC Officer; File in weekly envelope;	O&CH; Weekly Envelope
4. Sales & Dues Receipts				Issues receipts; Enter sales receipts in QBO; Calculate sales tax for sales receipts; Enter dues receipts in QBO	Inspect for current/accurate weekly receipt records	Financial Review				www.mooseintl.org Online Training: QuickBooks Modules 4 and 5 (for receipts and deposits)
5. Deposits				Make weekly deposits at bank and in QBO; Maintain duplicate deposit slips	Initial duplicate weekly deposit slip; Inspect for current/accurate weekly deposits	Financial Review				www.mooseintl.org Online Training: QuickBooks Modules 4 and 5 (for receipts and deposits)
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 QBO (COGS); Adjust post-sales inventory in QBO; Track monthly sales/gross profit; <i>See SQ Manager if also SQ Manager</i>		Financial Review	Conduct monthly inventory (SQ, Lodge, bingo, gaming)		Recommend order quantities; changes to routinely stocked items (per feedback)	www.mooseintl.org Online Training: QuickBooks Modules 7 (for adjusting inventory)
7. Bills	Sign approved checks; Examine/make recommendation for payment	Give input for payment	Give input for payment	Enter all bills in QBO (recurring, non-recurring, Moose Int'l Statement of Accounts and Endowment fund remittance); Pay bills (in QBO also)	Sign authorized checks; Inspect for current/ accurate weekly bill payments	Financial Review	Examine/approve weekly bills; Initial recommended bills for payment			Recurring/non-recurring bills; LCL.Web [Fraternity>Pay A/R Statement]; How to Verify Proper Bill Entry in QuickBooks
8. Bank Accounts				Ensure accuracy of bank signature cards; Enter daily/weekly transactions in QBO; Reconcile all cash accounts monthly;		Financial Review				

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Finances (cont.) 										
9. Financial Reports - Transmits & Financial Reviews	Ensure monthly reports are transmitted on time			Create monthly reports; Transmit monthly reports to Moose Int'l by the 15 th of every month; Print monthly reports for financial review file		Financial Review				QBO Reconciliation Report; Bank Statements; Financial Monthly Reports
10. Payroll	Name/employ, SQ Manager; Budget for, and approve, wages for all employees	Name/employ, SQ Manager; Budget for, and approve, wages for all employees	Name/employ, SQ Manager; Budget 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	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
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		Financial Review				Previous Year Taxes; www.irs.gov; Real Estate/Property Tax bills; Sales Tax Calculator; Dept. of Revenue; Local Ordinances
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		Financial Review				Previous Year Taxes; www.irs.gov; 990 Help Files
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		Financial Review				Previous Year Tax Folder www.irs.gov; 990 Help Files
						Financial Review				