Job Title: Financial Reviewer

Episcopal Diocese of Milwaukee 804 E Juneau Ave Milwaukee, WI 53202 Date Prepared: July 2018

Reports to: Lead Financial Reviewer Classification: Part-time, non-exempt

Workload: Varies. Seasonal according to work load.

Expected average hours per month 10-15

#### **SUMMARY**

The Financial Reviewer reviews a congregation's finances following a set of guidelines. The process includes reviewing submitted materials, an on-site visit and a written report.

## PRIMARY / REGULAR DUTIES

- Communicate with the Lead Reviewer for assignments.
- Review materials from a congregation, noting areas needing special attention.
- Conduct an on-site visit or document review following procedural guidelines.
- Prepare a written report and submit to the Diocesan Office for processing.

## SECONDARY / OCCASIONAL DUTIES

- Participate in training related to financial matters of the Episcopal Church.
- Read materials assigned for deepening and developing understanding of church finances.
- Meet to assess review processes.
- Perform other related duties as needed.

#### **SUPERVISION**

The Lead Financial Reviewer directly supervises the Financial Reviewer. The position does not supervise others. The Bishop, Diocesan Administrator, and Diocesan Treasurer also have authority over the position.

# **OUALIFICATIONS, EDUCATION and/or EXPERIENCE**

- Minimum high school diploma with 2-5 years of clerical experience.
- Able to be responsible for confidential and time sensitive material.
- Excellent customer service and organizational skills.
- Must be familiar with bookkeeping, fund accounting, payroll processes and computers.
- Good verbal and written communication skills.
- Ability to exercise primary job functions with independent judgment.

## **TERMS AND CONDITIONS**

- Flexible work schedule to accommodate variety of workload.
- Continuing education opportunities approved by the Diocesan Office directly related to job duties. Time spent will be compensated.
- This position in not eligible for additional benefits.
- Ninety Day probationary period, at the conclusion of which a performance appraisal will be performed to determined continued employment. After the probationary period, there will be an annual performance appraisal.