

Finance Supervisor

Supervisor: Regional Team Leader

Department: Chapter Services

Date Created or Revised: April 2019

Purpose

Finance supervisors utilize their experience, leadership and coaching skills to ensure assigned collegiate chapters have the financial support they need to maintain financial wellness. They ensure chapters' financial advisors have the knowledge, skills, relationships and confidence to promote chapter financial success.

Responsibilities

- Assist chapter advisors in appointing, training and mentoring financial advisors in alignment with Gamma Phi Beta's training and resources.
- Supervise collegiate chapter financial activities for assigned chapters. Ensure chapters are following the budget process, timelines and approvals, review chapter financial activity on Billhighway and analyze chapter financial activity according to financial management standards.
- Collaborate with the collegiate chapter supervisor and financial advisor to address financial issues that arise concerning chapter budgeting, Billhighway or chapter financial activity.
- Track the completion of 990 Internal Revenue Service (IRS) tax forms and uploaded a copy to Beta Base.
- Assess financial strengths and challenges, set and manage financial goals with regional/new chapter team and the finance team.
- Identify chapters in need of additional financial support.
- Collaborate with regional/new chapter team members annually to schedule and lead chapter finance visits for assigned collegiate chapter(s). Submit a report via Beta Base within 10 days of visit.
- Provide feedback and suggestions to appropriate workforce personnel on resources, programming, project teams and initiatives set forth by the Sorority

Expectations

- This role requires 10-15 hours per week on average during the academic year.
- Travel: Volunteers in this role will be expected to up to 15 days per year.
- Learn and utilize Beta Base (chapter reporting system) and Billhighway (financial management platform) for assigned chapter(s).
- Complete all Fidelity volunteer online lessons and other required training.

- Complete training conversations with regional team leader within six weeks of 2 appointment.
- Participate in annual regional/new chapter team meeting, financial team meeting and regularly scheduled team calls.
- Respond to all communication within 48 hours.
- Pay annual **international alumnae dues** or be a **Life Loyal member**. To check if you are in good standing, login at GammaPhiBeta.org > Member > My Profile. On the first tab, if your paid through date is blank or if the date is in the past, you have not yet paid this fiscal year. If you are Life Loyal, you have paid for life and are in good standing!

Preferred Competencies and Experiences

- Self-awareness of strengths, challenges and motivation for volunteering
- Effective, clear and timely written and verbal communication
- Experience working on a team to meet established goals
- Desire to mentor and coach other alumnae volunteers
- Knowledge of financial best practices and Gamma Phi Beta financial policies, procedures and plans
- Ability to think critically about issues to propose a solution

