NCD

Lodge Officers Training Guide

Updated June 2025 by: ROBERT BROTHERTON, PDDGER

Elks Care - Elks Share

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The Grapevine Independent 24

Sacramento Bee: 24

Lillian Douglas 24

Scene Section/Upcoming Events 24

Email: gglyer@earthlink.net 24

Email: featcal@sacbee.com 24

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I. LODGE AUDITING & ACCOUNTING COMMITTEE'S DUTIES

G.L. Statutes – Section 13.020, requires the Exalted Ruler to appoint **not less than three members** to the Auditing and Accounting Committee.

In reviewing the duties of this committee, per **Section 13.040**, we are sure that you will agree that one person cannot handle the many year-around tasks required of this committee!

Below you'll find a chronological list of "suggested" tasks that should be performed by the Auditing Committee, and is not meant to be all-inclusive:

Time Frame	Suggested Task
Feb - Apr.	Interview and contract with CPA for Annual Audit
Mar - Apr.	Review Lodge's Segregated Budget
Apr – May	Complete "Year-End Check List" (see Tan Booklet)
May – Jun.	Review completed "Annual Financial Report"
By June 15th	Submit Annual Financial Report to the lodge
By June 30th	Submit Lodge-approved Annual Financial Report to the D.D. and the G.L. Auditing Committeeman for Area 7.
May – Jun.	Review Treasurer's and Secretary's "Operations"
May – Jun	Review handling of Petty Cash
Jun. – Jul.	Review of all taxes due
By Jun. 30th	Oversee Liquor & Sundries Inventory
July	Submit committee report to the Lodge (see Tan Booklet)
Aug. – Sept.	Review operations of the House Committee (Gov. Body)
Aug. – Sept.	Review Bingo operations
Sept. – Oct.	Review operation of the Board of trustees
By Sept. 30th	Oversee Liquor & Sundries Inventory
October	Submit committee report to the Lodge (see Tan Booklet)
By Dec. 30th	Oversee Liquor & Sundries Inventory
January	Submit committee report to the Lodge (see Audit and Accounting Manual)
By March 30th	Oversee Liquor & Sundries Inventory
Feb. – Apr.	Interview and contract with CPA for Annual audit
Anytime	"Spot Audit" on petty cash

Other._____ _____
Other. _____ _____

Resource Material:

Auditing and Accounting Manual (March 2022)

Financial Report System (FRS) Manual (June 2022)

I.A ELK'S "WHOLE ACCOUNTING"

The Lodge year is underway, you've worked hard to prepare the Lodge's "segregated" Budget and "Activities Calendar", and everyone's eager to implement Lodge objectives and goals.

A major goal of each Lodge should be to maintain financial stability, and to take corrective action when financial goals are not being met.

Financial goals of a Lodge are incorporated into the Lodge Budget – it lists goals for income, goals for expenses, and goals for profit. The tools used to monitor budget goals are the following accounting reports:

- ***Balance sheet, and Income Statement = Financial Statement***

Accounting "pieces" that are used to prepare the Financial Statement include:

1. Secretary's "Cash Receipt Book"
2. Treasurer's "Cash Receipt Book"
3. Bank Books (checking and savings)
4. Bank Statements
5. Cash Receipt Journal
6. Disbursement Journal
7. General Ledger
8. Vouchers
9. Order Request Forms
10. Inventory Forms
11. Budget
12. Minutes from Trustee and House Committee meetings

Individuals that need to be involved in the Lodge's financial stability include:

1. Exalted Ruler
2. Secretary
3. Treasurer
4. Trustees
5. House Committee Members
6. Audit Committee Members
7. Office Secretary
8. Bookkeeper
9. Outside Auditor
10. Event Committee Chairperson

For a list of responsibilities for many of the above individuals, refer to Grand Lodge Statutes, and other Grand Lodge manuals.

LODGE REPORTS

1. MONTHLY

- Lodge financial reports must be filed into the FRS by the 3rd Friday of the month for the previous month's activity.
- Inventory (if not quarterly)
- Income Statement
- Balance Sheet
- Minutes of Meetings (Lodge, Board of Directors, and House Committee)

2. QUARTERLY

- Inventory (if not monthly)
- Audit Committee
- Budget Review and Modification

3. ANNUAL

- Budget
- Annual Grand Lodge Report

RESOURCES

1. Grand Lodge Statutes (November 2024)
2. Auditing and Accounting Manual (Revision date: March 2022)
3. Financial Report System (FRS) Manual (June 2022)
4. Uniform Chart of Accounts (Section III (FRS Manual)
5. GL Officers' and Committeeman's Manual (Revision date: March 2022)
6. Lodge By-Laws
7. Software Vendors
8. District Business Practices Committee
9. State Business Practices Committee
10. GL Auditing committeeman for Area 7
11. District Deputy Grand Exalted Ruler
12. District Vice President
13. District Leaders
14. Past Exalted Rulers Association

II. BOARD OF DIRECTORS

(Summary of Duties) (Section 12.070 GLS)

The Board of Directors is responsible for all the assets of the Lodge. This includes, but is not limited to: building and grounds; bank accounts; investments and deposits. They have fiduciary responsibility to the members of the Lodge for the preservation and protection of assets. For all intents and purposes, they are the landlord of the facility.

The Board of Directors is responsible for all alterations, maintenance, painting, permanent decorations, equipment, furniture and grounds of the facility since these are all assets of the Lodge. These items are not subject to the authority of either the House Committee or Officers of the Lodge. However, all decisions of the Board of Directors on these matters are subject to the floor of the Lodge.

The Board of Directors is responsible for the presentation of a segregated budget to the floor of the Lodge on or before the last meeting in April. All expenditures must be in accordance with the budget. Expenditures that have not been budgeted, can be made only if approved by 2/3 vote of the Lodge.

The Board of Directors is responsible for purchasing all supplies required by the Lodge, including all books, stationary, and papers required by the Officers for the performance of their duties.

The Board of Directors has other miscellaneous duties. Two such duties are to appoint an Accident Prevention Manager from within their ranks, and to hold the bonds for the Officers.

The Board of Directors must meet monthly, but it may be advisable to meet more frequently. They must report monthly to the Lodge. All actions of the Board of Directors are subject to the approval of the Lodge.

The Board of Directors (acting only as Directors) CANNOT:

- *Appoint Committees.*
- *Schedule or hold activities.*
- *Put on or organize fund-raisers.*
- *Hire or fire employees, except for repair person (s).*
- *Deny the Exalted ruler permission to put on a function.*
- *Approve anything.*

All adoptions and decisions by the Board of Directors can only be granted by the floor of the lodge.

III. HOUSE COMMITTEE

The House Committee or other body managing the Club has the responsibility for the success of important features of the Club; The Committee should be familiar with all the laws of the Order, particularly those statutes, rules and decisions affecting their duties and actions. Sec. 16.040 GLS

The three forms of House Committee are:

A. Four chair Officers and Trustees, chaired by the Exalted Ruler. (op 16)

B. Trustees of the Lodge chaired by their chairman. The Exalted Ruler is an ex-officio member of the board and of this committee. (12.020 GLS) The Trustees must hold a separate House Committee meeting and keep minutes before making House Committee decisions at a Trustee meeting.

C. A Committee appointed by the Exalted Ruler (3-13 members) and the chairman is selected by that committee. The Exalted Ruler is entitled to an invitation to all meetings.

The House Committee is responsible for the operation of the restaurant and bar. An over simplified statement regarding their duties is:

"If you cannot eat it, drink it, hire or fire it,

it does not belong to the House Committee."

Responsible for:

A. Scheduling hours of operation of the facility.

B. Setting prices and hiring and firing employees

C. Prepare an annual budget for their operation and submit for approval of membership. Before the last meeting in April

D. Must give monthly reports to the Lodge on the financial condition of the club with a comparison to each budget item.

E. Enforcing all house rules. They may suspend a member's house privileges, but not his/her membership privileges.

Does not have the authority to:

- Make repairs or alterations to the building, furniture or decorations.
- Purchase permanent equipment of any kind including stoves, refrigerators, etc.
- Hire bands or entertainment.
- Sign any contracts or leases beyond one year except for personnel items such as for a manager or chef.
- Organize any activities or appoint any committees.

ALL ITEMS EXCEPT FOR PERSONNEL MATTERS AND PRICES ARE SUBJECT TO THE FLOOR OF THE LODGE

The Committee should be familiar with all the laws of the Order, particularly those statutes, rules and decisions affecting their duties and actions

Attention is called to the following Statutes and particularly to the opinions listed under the respective Sections in the Annotated Statutes:

Grand Lodge Statutes Section 16.040

The Committee should be familiar with all By-Laws and House Rules of their respective Lodge. If a By-Law or House Rule is in conflict with a Grand Lodge Statute(s), it is the Grand Lodge Statute that prevails.

The duties and problems of a House Committee should be handled in the same way as any business problem would be handled. Sound business judgment in financial matters, courteous and fair treatment in personal matters affecting the membership, should be the guiding rule for this Committee.

The House Committee should make a study of the needs and desires of the members and do everything possible to add to their comfort.

The Committee **hears all complaints** against members for their action or conduct that occurs on premises under its control.

The Committee has the **power to suspend** a Member **from the Club, social parlor or other facility privileges** for a period not exceeding one (**1**) year, **for violation of rules** duly adopted by the Lodge and approved by the Committee on Judiciary for such Club, etc. or for **Conduct Unbecoming an Elk on such premises**.

The Committee **MUST** give the accused member ten **(10)** days written notice to appear at a duly called meeting to hear the case and allow the member to put forth any defense to the charges.

The notice must contain factual information about the charge or charges and what rule, regulation or By-Law was violated.

If the Committee finds that a member has **violated** any of the rules and suspends his or her privileges to use the facilities for any time from one **(1)** day up to three hundred and sixty five **(365)** days the member can **appeal to the Floor of the lodge**.

The decision of the Lodge is final and **NO** appeal can be made to the Grand Forum, **except** for violation of due process.

The Committee **CANNOT SUSPEND** A Member's **Lodge membership. This is solely** within the jurisdiction of the Subordinate Forum

The same conduct may be under the jurisdiction of the Subordinate Forum and the managing body, i.e. conduct unbecoming an elk. This **does not** constitute **double jeopardy** as any managing body actions are of an **administrative** nature while Subordinate Forum actions are of a **judicial** nature. **Chapter 8, Section 8.010, Opinion 01 of the GLS**.

The decisions of the Grand Forum should be taken as **FINAL**.

IV. LODGE SECRETARY

The importance of the work of the Secretary cannot be overemphasized.

- Should study and follow the Secretary's Manual which is obtainable from the Grand Secretary. Should be thoroughly familiar with the laws of the Order
- Keep correct minutes of all sessions of the Lodge.
- Keep correct accounts between the Lodge and its members, assign to each member a number and place it opposite his/her name on his membership card.
- Keep a correct mailing list of the members and furnish to the Circulation Manager of The Elks Magazine immediately the names and addresses of new members initiated into the Lodge, together with the names of such members as shall have died, demitted, been expelled or dropped from the rolls, and the new address of each member who has changed his address. (See Sec. 12.050, Statutes.)
- The Secretary should be careful to see that mailing lists of the Lodge are not allowed to come into the possession of those who are not entitled to them and who might use them for improper or commercial purposes.
- Set up such machinery as may be necessary to keep in touch with all members whether resident in the community or outside, having in mind that every member who fails to be kept in contact with the activities of the Lodge and the Order is harder to keep on the membership roll.
- Give proper assistance to a member who expresses a desire to affiliate with another Lodge.
- Collect all dues from members of the Lodge. The Lapsation Committee is not supposed to take away from the Secretary the responsibility for collection of dues, but is to work with him/her in seeing that no member is dropped from the rolls until he/she has been given the fullest opportunity to meet his obligations.
- Keep all records neatly and legibly written and in such form that anyone empowered to do so can easily verify their accuracy.
- Keep and show the status of the members' accounts. Carefully safeguard the records and keep the Exalted Ruler and the Treasurer advised of their location.
- As a personal safeguard, see that the statutory provision for auditing of his accounts is observed.
- Receive all monies due the Lodge from any source, except the income from Lodge property, whether real or personal, which shall be collected by the Board of Trustees.
- Pay all monies to the Treasurer at the earliest moment practicable, and take his receipt therefore.
- Attend to all correspondence, subject to the approval of the Exalted Ruler.
- Formally present all communications received by him to the Lodge, first submitting the same to the Exalted Ruler.
- Issue all certificates pertaining to the business of the Lodge.
- Inform persons elected to membership of such fact, and notify rejected applicants.
- Notify the members of all committees of their appointments, together with the subject given in their charge.
- He shall attend all officially called District Deputy Clinics for his Lodge unless excused for good cause shown to the District Deputy with jurisdiction.

- Perform all such other duties as are inherent in and pertain to the duties of his office, or are required by the laws of the Order or by the By-Laws of his Lodge.
- Report to the Grand Secretary all expulsions and suspensions of members, giving their names, ages, birthplaces, residences and occupations.
- Report promptly to the Grand Secretary any changes in the offices of Exalted Ruler and/or Secretary.
- Report Quarterly Membership Statistics as required
- File Annual Report promptly before May 1st each year.
- Give bond in such sum as the Lodge may fix in its By-Laws, but at least $5,000.
- Present a written report for the preceding six months at the first regular session of the Lodge in April and October.
- Should be particularly familiar with the following statutes which pertain to his/her office:

  Section 3.090 - Balloting and Election of Officers
  Section 8.020- Service of complaint upon the accused for Subordinate Forum.
  Section 8.040- Notice to accused of names of members drawn from CLMS app.
  Section 8.050- Time of Trial.
  Sections 8.070-8.080- Amended complaints
  Section 8.200-Manner of serving notices.
  Sections 8.220-8 .250-Appeals
  Section 12.050- Secretary Duties, bond and compensation.
  Section 13.040- Filing of Annual Audit with Grand Lodge by the Auditing Committee
  Section 14.030- Initiation by another Lodge.
  Section 14.090-Application of party previously rejected.
  Sections 14.1 10-14.120-Dimits
  Section 14.140-14.150- Visiting or identification cards for members and their families
  Section 14.180- Application of former member to re-activate membership.
  Section 16.010- Annual Report to Grand Secretary and penalty for failure to reply.
  Section 16.110- Use of Official Lodge Seal; books to be kept by Secretary.

The Secretary shall be the custodian and have the care of the seal of the Lodge and shall keep the following books, for all of which he shall be responsible:

Visitors' Register This register should be placed at some convenient location near the entrance of the Lodge and all visitors required to register.

Minutes or Proceedings of the Lodge

On the first of each month the Secretary should furnish the Lapsation Committee with a list of delinquent members and obtain from that Committee a report on each name. All information in turn is to be forwarded to the Exalted Ruler.

Alphabetical list of expulsions, suspensions and rejections

Such books as may be necessary to present clearly the receipts and accounts of the Secretary and Treasurer and general financial and other transactions of the Lodge.

It shall also be the duty of the Lodge to keep for examination, the Constitution and Statutes of the Order, which must be furnished by the Grand Secretary and to furnish each new member with copies

The seal of the Lodge shall be impressed upon receipts for dues, official documents and all papers issued by and under the authority of the Lodge.

V. GUIDE TO INSTALLATION OF SUBORDINATE LODGE OFFICERS

Installation of Officers is a memorable occasion, the installation may be held on any date and time. You might consider your Lodges customs and traditions when planning your installation. The following guidelines for general use, to be adapted as you wish to help you plan your installation.

Exalted Ruler

- Determine date and time
- Decide on a social only, or a dinner.
- Provide drink tokens for G.L. installers.
- Sending of invitations to special guests.

Persons to include in invitations

- All Lodge members
- CHEA State President
- District Deputy Grand Exalted Ruler
- State Vice President
- District Leaders
- District Committee Chairmen
- Past District Deputy Grand Exalted Rulers
- Lodges in District
- Exalted Rulers in District
- Special invites of incoming Exalted Ruler
- Family, neighbors, friends

Obtaining services of DDGER

- Custom to ask current DDGER to preside
- Decide/ask early as many Lodges have installation on same date.
- Request in writing
- Make request early to give DD time to plan
- Incoming ER may ask any PER, PDDGER
- Be sure to advise DDGER of your plans.

Past Exalted Rulers Install Officers

- Advise PER Association when a date and time is determined.
- Officers may request particular PER to install them.
- Officer should advise Past Exalted Rulers of his/her choice.

Leading Knight Chairman

(Confer with incoming ER as to his/her program desires)

- Presents bouquet of flowers to incoming Exalted Rulers spouse
- Provide a committee/person for:
- Guest book
- Boutonnieres for Officers and Installers
- White for Officers

- Red for Installers Corsages for DD and VP ladies
- Corsages for outgoing/incoming ER's lady
- Assign person (s) to apply flowers
- Set up Lodge for Installation Ceremony
- Set up crew for dinner
- Table set up and decorations
- Obtain kitchen staff
- Obtain servers
- Clean up crew
- LK collects monies from other Officers for gift
- Secure organist
- Print programs for installation/dinner
- Obtain a Photographer
- Arrange for hors d'oeuves

Installation Introductions

(At the conclusion of Installation program)

Grand Exalted Ruler

Introduces Grand Lodge Installing Officers and ladies

New Exalted Ruler

Introduces

- Officers who each introduce their spouse
- Visiting VIPs
- Exalted Rulers family
  (Optional may wait until dinner)

VI. IMPORTANT REPORT AND CONTEST DATES

The following are lists of some of the important due and deadline dates that you must complete and submit. Not all due dates are listed, you may write those in this booklet for future reference.

Each Lodge Secretary should have in their possession complete up to date Grand Lodge Manuals, Statutes, Training Booklets and Directories as listed on the check sheet form required for the District Deputy visit.

All Lodge Secretaries are strongly urged to have available all up to date material. Any material you do not have, or is outdated you should order from Grand Lodge now to ensure you are in compliance.

The following list is not in order of importance, it is important that you remember the type of report and the date it is due. You will note that several contests and report(s), not due for several months, require that you should begin planning now.

Special Attention: District Committee Chairpersons

It is important that you submit copies of your monthly or quarterly reports to the Vice President, and the District Deputy.

A. REPORTS

1. **Annual Report** (**Laws of the Order, Section 16.010**

   (Copy due to DD by April 20th)

   Must be filed with the Grand Secretary, accompanied by a check for PER Capita Tax, **report will be delinquent after MAY 1st** and delinquents are subject to a $100 fine. This report is urgently needed in order to close the Grand Lodge books and compile the various printed reports for the Convention.

2. **Audit/Financial Report** (Laws of the Order, Section 4.330 and 13.040, and Grand Lodge Auditing and Accounting Manual and Grand Lodge Program)

   (Send a copy of report and transmittal letter to the DD)

   Section 13.040, Laws of the Order requires each Subordinate Lodge of the Order to have an annual audit, review or compilation performed by an accountant approved by the Lodge who is independent of the accounting and bookkeeping operations of the Lodge or any entity thereof. This examination is to include all books and financial records of the Lodge, its Officers and Committees, Home, Club, or Separate Corporation of the Lodge and any other activities conducted by the Lodge, and should be performed as soon as possible following the close of the fiscal year ending **March 31st**.

   The completed financial report, which will include the required standard audit report forms and a budget comparison, complete for all entities of the Lodge, should be in the hands of your Lodge Auditing Committee by June 1st.

   The Auditing Committee should submit the financial report to the membership at a regularly scheduled meeting not later than June 15th**.** Not later than June 30th, the original transmittal letter, complete financial report forms, a copy of the Federal Tax Returns should be submitted to the Area Member of the Grand Lodge Auditing and Accounting Committee and a copy to the District Deputy Grand Exalted Ruler.

   The Laws of the Order provide for an initial *$100.00* fine for Lodges that *fail to file the report by June 30, plus subsequent fines of an additional $100.00 for each 30 days' delay thereafter, not to exceed $500.00 total.*

STEPS NECESSARY TO ASSURE A SATISFACTORY AUDIT REPORT

As required by Section 13.040, Laws of the Order

1) Auditing & Accounting Committee appointed by Exalted Ruler at the first regular session after installation as By-Laws require.
   - **NOTE:** No Lodge Secretary, Treasurer, Trustee or any member of the Supervising or Managing Body of the Club, Social Parlor or other facility established in connection with the Lodge shall serve as a member of the Lodge Auditing & Accounting Committee.
2) Auditing & Accounting Committee should study the Lodge's Financial Report from the preceding year and consult with the Auditing & Accounting Committee from the previous year to see that the recommendations of the Accountant have been complied with or, at least, evaluated. This also applies to the Evaluation of Financial Report sent the Exalted Ruler by the Grand Lodge Auditing & Accounting Committee.
3) Auditing & Accounting Committee should study Section 13.040, Laws of the Order (current edition), and the sections of **The Accounting Manual** and **The Auditing & Accounting Committee Manual** dealing with the financial report so as to be familiar with the requirements listed by the Grand Lodge as to the scope and form of their examination and the official Financial Report.
4) All entities of the Lodge are to be included. If there is a Home, Club or separate corporation, the books of such separate entity must be audited and its Financial Report filed along with the Lodge Financial Report.
5) The Auditing & Accounting Committee selects an independent accountant whose responsibilities are preferably covered by a written contract. This should be done as soon as possible, so that the accountant will be advised of the deadline for filing the Financial Report with the Grand Lodge and can budget time to be sure to have the report completed on time. Most of the fiscal years of the Lodges and their entities end March 31 and, because this is the busy tax season with auditors and accountants, the accountant should be hired as early as possible.
6) The Auditing & Accounting Committee must instruct the accountant as to the scope of the examination so that it will fulfill the requirements of the Grand Lodge. The accountant should be familiar with the Accounting Manual so that the completed report will include all 12 pages of the Grand Lodge Financial Report Forms, and Federal Income Tax Returns.
7) The accountant should be instructed to submit the financial report directly to the Lodge Auditing & Accounting Committee when it is completed. Having employed and instructed the accountant, the Auditing & Accounting Committee should receive the report and discuss it in detail with the accountant. The auditing & Accounting Committee should determine if the accountant has carried out its instructions and have a complete understanding of the accountant's recommendations and the reasons for them.

   The Auditing & Accounting Committee must submit the Financial Report to the Lodge. This should be done at a meeting prior to June 15, and the Secretary must place certification of its receipt by the Lodge in the Transmittal Letter.
8) Finally, the Secretary must send a copy of the Financial Report to the Area Member of the Grand Lodge Auditing and Accounting Committee and a copy to the District Deputy Grand Exalted ruler **to arrive by JUNE 30th.** One copy should be kept in the Lodge files and a copy retained by the Accountant. ***Failure to file the report by June 30 will subject the lodge to an initial $100.00 fine, plus subsequent fines of an additional $100.00 for each 30 days' delay thereafter, not to exceed $500.00 total.***.

9) After the Financial Report for the fiscal year in which they were appointed is completed, the Members of the Committee continue with their duties relating to quarterly reviews and reports to the Lodge about the Lodge's financial status. These reports should be presented at the last regular meeting in the months of July, October and January.

Note: All Lodges audited by any taxing body and the results should be reported to the sponsoring Past Grand Exalted Ruler(s).

3. Membership Reports

(**Must send copy to DD within 5 days of reporting period)**

Should be mailed by Lodges within 5 days after the end of each period

4. Charity Records Booklet

- You should be conducting your charitable and community service activities, and to maintain the vital statistics in the Charity Records Booklet so that a full and accurate report can be made at the end of the Lodge's fiscal year in MARCH.
- "The booklet shall be kept permanently at the Lodge Secretary's desk, and immediately before or after the Lodge meeting at which any charitable activities committee makes its final report to membership, the Committee Chairperson enters the required figures in the appropriate page, category and columns with the assistance and under the direction of the Secretary."

B. IMPORTANT DATES

The following are important dates for contests and reports listed in order of Lodge year.

APRIL

4th Trustees Budget to Lodge

10th Lodge Committee Chairpersons report to DD, with separate list of all Officers.

20th ANNUAL REPORT DUE TO DISTRICT DEPUTY

30th First quarter payroll reports due

MAY

1st ANNUAL REPORT WILL BE CONSIDERED DELINQUENT

JUNE

1st Compiled financial reports in hands of Lodge Auditing Committee

15th Lodge Annual Financial Report submitted to Lodge membership

30th Lodge Audit/Financial Report to Grand Lodge Auditing Committee

GER Award Pins for Outstand Members

JULY

- Lodge Audit/Accounting Committee shall review the required record-keeping of the financial affairs of the Lodge and club for the year to date, including compliance with the approved budget and report at the last regular meeting of the Lodge this month.
- At the Lodge first regular meeting after the Grand Lodge session, Exalted Ruler gives a report to the membership.

30th Second quarter payroll reports due

AUGUST

- At the Lodge first regular meeting after the Grand Lodge session, Exalted Ruler gives a report to the membership.

15th Annual IRS Federal Tax Forms 990 and 990T due

OCTOBER

- Lodge Audit/Accounting Committee shall review the required record-keeping of the financial affairs of the Lodge and club for the year to date, including compliance with the approved budget and report at the last regular meeting of the Lodge this month.

31st Third quarter payroll reports due

NOVEMBER

1st Grand Exalted Ruler Membership Report due

JANUARY

- Lodge Audit Committee arrange for Annual Audit
- Lodge Bulletin Contest "D"

31st Fourth quarter payroll reports. This includes the Federal annual unemployment Form 940

31st Information returns Form 1099 are due to recipient

31st W-2 Forms due to employees by

31st Veterans Remembrance Report due to District Deputy

FEBRUARY

8th Elks Magazine Audit Form to Grand Lodge Secretary

10th Outstanding Lodge Secretary of Year selection to District Deputy

15th Presidents Achievement Program form due to Vice President

28th W-2 forms, transmittal for W-3, Form 1099 and transmittal Form 1096 are due to IRS

MARCH

15th Final ENF remittance due

Best Youth Program Brochure to State

All American Contest, A postmarked to DD no later than 3/15

Community Service & Image Contest

Elks Training Program

31st Citizen of Year

Elk of Year

Officer of Year

GER Award for Exalted Ruler & Lodges

VII. LAWS OF THE ORDER (JUDICIAL PROCEDURE)

THE CONSTITUTION OF THE BENEVOLENT AND PROTECTIVE ORDER OF ELKS OF THE UNITED STATES OF AMERICA

ARTICLE 1, Section 1:

The **Constitution**, the **Statures** and the **Ritual** are the Supreme Law of the Order. The Decisions and Opinions are interpretations of that law.

1. All three (3) are found in the official Grand Lodge publication **"Statutes Annotated".**
2. Each section of the order is numbered and each may be followed by:
    A. **Decisions**: Rulings that have been made by the Grand Forum and published. The Grand Forum is authorized to render Decisions as the judicial body of the Order.
    B. **Opinions:** These are the opinion of the Chairman of the Committee on Judiciary as Legal Advisor of the Grand Lodge and its members.

ARTICLE 11, Section 1:

1. Departments of the government of the order shall be divided into three (3) independent coordinate departments, viz: **Legislative**, **Executive** and **Judicial** departments**.**
2. This section pertains to the **Judicial Department.**

ARTICLE VI: THE JUDICIAL DEPARTMENT

Section 1: The judicial power shall be vested in one (1) **Grand Forum**, in such **Intermediate Forums** as the Grand Lodge may from time to time establish, and in **Subordinate Forums**.

Article V1, Section 1, Opinion 01:

No State Association shall create a Forum to exercise judicial power over Subordinate Lodges or Members thereof. (**This means that only the Grand Lodge has that power).**

1. **The Grand Forum**
    a. **Section 2, Article V1**: The **Grand Forum** shall consist of Five (**5**) members who shall be called Grand Justices, and whose terms of office shall be five years and until their successors have been appointed and qualified.
    b. The Grand Exalted Ruler shall nominate, and with the consent of the Grand Lodge, appoint the Grand Justices in the manner provided by law. Usually one at each Grand Lodge Session.
    c. **Opinion 01, ArticleV1**: The Grand Forum has the power to modify or reverse the decision of the Subordinate Forums, on appeal. It may also alter the punishment given by the Subordinate Forum to comply with statutory provisions.
    d. **Section 3, Article V1:** The Grand Forum shall meet at least three times in each year.
2. **The Subordinate Forum**:
    a. **Section 4, Article V1:** The Subordinate Forums shall consist of the Presiding Justice of the Subordinate Forum appointed by the Exalted Ruler in accordance with the Statutes of the Order, and Four members of each Subordinate Lodge who shall be appointed by the Exalted Ruler, after they are properly picked.

b. Subordinate Forums shall have original jurisdiction in all matters involving an offense committed against the Laws of the Order by an affiliated or unaffiliated Member of the Lodge. The Subordinate Forum shall decide all cases and prescribe the penalty. **Chapter 8, Section 8.010 and Section 4, Article V1.**

c. The Subordinate Forum shall try Members of Subordinate Lodges for violation of the Laws of the Order.

d. The decision of a Subordinate Forum shall be final unless an appeal is taken in accordance with the Laws of the order.

APPEALS: Chapter 8; Section 8.250

a. Appeals from the decision of the Subordinate Form must be to the Grand Forum.

b. The appeal of a member that was **found guilty** and **sentenced** must be in the proper written form and submitted to the Lodge Secretary and the Grand Lodge Secretary within 30 days after the judgment is entered in the minutes of the Lodge. The Grand Secretary shall forward copies of the appeal to the Justices of the Grand Forum.

c. The appeal process is specific and any failure to meet the time periods with the required documents will cause the appeal to fail as it constitutes abandonment of the appeal and warrants dismissal. **(Grand Forum, Case No. 445, 1954)**

SUBORDINATE FORUM ACTIONS:

1. The member preferring the charges shall be the **"Accuser".**
2. The member charged shall be the **"Accused".**
3. The Notice of Intent will contain the name of the Accused and the Accuser, and a brief factual statement of the conduct upon which the alleged offense is predicated. It should also state what Statute, Rule or regulation the conduct violates.
4. The Accuser shall sign and **verify** the Notice of Intent under the **Obligation of the Order**. This is important because if the accuser is not acting in good faith, charges may be brought against the accuser at a later date.
5. This starts the Mediation Session procedures.
6. The Secretary shall promptly serve a copy of the Notice of Intent on the Accused and, with two (**2**) business days of receipt, notify the Mediator of the filing of the Notice of intent.
7. The **Exalted Ruler** appoints the Mediator.
8. The Secretary should also, but is not required, to notify the District Deputy Grand Exalted Ruler.
9. The Mediator shall immediately contact the Accused and Accuser and arrange an informal mediation session within five (5) business days of the filing of the Notice of Intent.
10. If no Mediation agreement is reached, the Accuser must file a properly prepared complaint (three copies) with the Lodge Secretary within 10 days after the Mediator files the required written Mediation report with the lodge secretary.
11. The Secretary informs the Exalted Ruler and at the next Lodge meeting the Subordinate
12. After a properly subordinate Forum is appointed (GLS: The Presiding Justice sets a Preliminary Hearing Date)
13. **Notice of Intent:** All Subordinate Form actions begin with the filing of a written **"Notice of Intent"** with the lodge secretary.

14. At the preliminary Hearing the Accused enters a plea of Guilty, or Not Guilty or files a Motion to make more specific or a motion to dismiss.
15. The presiding Judges rules on any motion and or sets the time for trial in the case of a not guilty plea.
16. If the presiding Judge dismisses the case at the preliminary hearing the accuser's appeal is to the Grand Forum, and **NOT** to the Lodge floor.
17. If at trial a **Guilty** verdict is rendered, then the Subordinate Forum sets the punishment in accordance with Grand Lodge Statutes.
18. Any appeals must be to the Grand Forum and again **NOT** to the Lodge

HOUSE COMMITTEE OR HOME CLUB MANAGEMENT OF THE CLUB, SOCIAL PARLOR OR OTHER FACILITIES.

Grand Lodge Section 16.040

This section allows a Lodge to choose the way it can manages the social quarter, etc.

- By the Exalted Ruler, Esteemed Leading Knight, Esteemed Loyal Knight, Esteemed Lecturing Knight, and the Trustees of the Lodge; or
- By the Trustee of the Lodge; or
- By a house Committee (of not less than 3 or more than 13) to be appointed by the Exalted Ruler. (The exact number must be set by a by-Law).

The managing body is the body that **hears all complaints** against members for their action or conduct that occurs on premises under the control of the Managing body.

The Managing body has the **power to suspend** a Member **from the Club, social parlor or other facility privileges** for a period not exceeding one (**1**) year, **for violation of rules** duly adopted by the Lodge and approved by the Committee on Judiciary for such Club, etc. or for **Conduct Unbecoming An Elk on such premises**.

1. The managing body **MUST** give the accused member ten **(10)** days written notice to appear at a duly called meeting to hear the case and allow the member to put forth any defense to the charges.
2. The notice must contain factual information about the charge or charges and what rule, regulation or by-law was violated.
3. If a member is found to have **violated** any of the above named rules and has his or her privileges to use the facilities suspended for any time from one **(1)** day up to three hundred and sixty five **(365)** days the member can **appeal to the Floor of the lodge**.
4. The decision of the Lodge is final and **NO** appeal can be made to the Grand Forum, **except** for violation of due process.
5. The managing body **CAN NOT SUSPEND** A Member's **Lodge membership** as this is within the jurisdiction of the Subordinate Forum

The same conduct may be under the jurisdiction of the Subordinate Forum and the managing body, i.e. conduct unbecoming an elk. This **does not** constitute **double jeopardy** as any managing body actions are of an **administrative** nature while Subordinate Forum actions are of a **judicial** nature.

Chapter 8, Section 8.010, Opinion 01, of the GLS

The decisions of the Grand Forum should be taken as **FINAL**.

VIII. COMMUNITY SERVICE AND IMAGE OF ELKDOM

OBJECTIVE

Win the community service and image contest & improve the image of Elkdom in the Community

PLAN

Things you can do to facilitate publicity on each event:

1. Maintain Media contact list, Local newspapers, radio, TV, Elk Magazine
2. Establish good relationship with local media.
3. Have a digital camera at all events.
4. Prepare a draft article in advance.
5. Stage and Compose your photograph (show Elks Logo/banner etc. (See attachment 2).
6. Limit number of people to 10 or fewer, photo resolution minimum: 1500 x 900 pixels.
7. High-Visibility participation in various Community-Spirit Events (See attachment 3).
8. Maintain current list and invite Governmental Representatives for your events.
9. Attend City and Community Council meetings.
10. Ask Council members to become Elks.
11. Immediately after the event send photo and article to Bulletin Editor & Media.
12. Comply with Elk Magazine and CHEA requirements for articles and photos. Save a copy of each publicized article. For CS & Image Brochure Contest (place in three-ring binder with table of contents and summary & check out the winning brochures at Grand Lodge booths)
13. Elks filling the needs of community and publicizing it:
    a. Schedule events and activities involving Community Service and take action to widely publicize each event in your bulletin, local newspapers, radio, TV, CHEA and Elks Magazine.
    b. Bulletin is your signature and your baseline.
    c. Members and their guests/neighbors are part of community

       Bulletin articles can attract new members.
    d. ER should proofread all articles and photos.
    e. Make sure events and dates are correct.
    f. Use bulletin articles & photos for submission to local media.

AN EXAMPLE OF AN ANNUAL SCHEDULE OF EVENTS

MARCH:	Citizen of the Year
MARCH OR APRIL:	Officer Installation
APRIL:	Kids Day in the Park
MAY:	Youth Week Proclamation & Events Mother's Day Services & Brunch (May 13th) Armed Services Day (May 19th) Memorial Day (May 28th)
JUNE:	Flag Day (June 14th) Father's Day Brunch VP Visits
JULY:	4TH of July Parade
AUGUST:	DD Visit NCD BBQ for Yountville Veterans Law Enforcement Recognition Dinner
SEPTEMBER:	Supplies for Elementary Schools MVS Scholarships Available
OCTOBER:	DD Homecoming
NOVEMBER:	MVS Scholarship Applications Veterans Day (November 11th) Veterans Remembrance Dinner Thanksgiving Dinner Hoop Shoot Packing Food Baskets
DECEMBER:	MVS Scholarship Applications Americanism Essay Contest Winners Drug Awareness Contest Winners State President's Visit Delivery of Toy and Food Baskets Christmas Party
JANUARY:	Firefighters Recognition Dinner NCD Hoop Shoot
FEBRUARY:	State Hoop Shoot Purple Pig Dinner Blue & Gold Scout Dinner
MARCH:	Lodge Appreciation Dinner

- **Keep charities record booklet up-to-date—very important!**
- **Have chairperson of each event provide data immediately following event**
- **Submit report on time to district chairperson**

PR/Media Contact List

(Enter contact information for your local newspapers such as the below example for Rancho Cordova)

Local Newspaper

The Grapevine Independent
Shelly Blanchard
Email: grapeindep@aol.com

Sacramento Bee:

Folsom Bureau:
Lillian Douglas
Email: ldouglas@sacbee.com Phone: 916-608-7445

Scene Section/Upcoming Events
Gloria Glyer
Email: gglyer@earthlink.net

Friday & Sunday Ticket Calendar:
Email: featcal@sacbee.com

Please include: Event name; specific times & dates; location & address; ticket prices and cover charges; name of sponsoring organization; phone number to verify info; color photographs &slides will not be returned.

Elks Magazine:

email: magnews@elks.org

For guidelines go to: www.elks.org/elksmag/FraternalGuidelines.pdf
(Photos must have minimum resolution of 1,500 by 900 pixels, limit photo to 10 or fewer people)

CHEA Newspaper contact and guidelines

"THE CALIFORNIA-HAWAII ELK"

"The California-Hawaii Elk" is published bi-monthly by the California-Hawaii Elks Association.

If you are interested in submitting an article, please read the following:

Please send all news and photos to: Ian Lanouette,

Editor-in-Chief, "THE CALIFORNIA-HAWAII ELK"

via email to: editor@cheamag.org

For all submission deadlines and specific article/ photo requirements go to https://chea-elks.org/chea-magazine-2/

EXAMPLE 1

For TV and Radio Stations, go to their websites.

THE ELKS LOGO ON CERTIFICATES AND PLAQUES IS EASY TO DETECT AND MAKES FOR GREAT PROPS FOR STAGING PHOTOS AS SHOWN BELOW

RANCHO CORDOVA ELKS HONORED FOR
OUTSTANDING SERVICE TO COMMUNITY & ELKDOM



EXAMPLE 2

RANCHO CORDOVA ELKS & COMMUNITY COME THROUGH FOR MILITARY FAMILIES



The Rancho Cordova Elks and the Rancho Cordova community have really come through for Northern California families of deployed military personnel, delivering over 700 “Food and Toy Baskets” (a week’s worth of food involving at least 5 boxes per family). Shown above at the Food Basket pick-up point are (l to r): Al Russell, President of Rancho Cordova Elks Lodge, SSG Bo Nigiraingas, from the B.T. Collins Sacramento Army Reserve Center, Mr. Bill Cummings, a local businessman who donated the warehouse space for storing the food and toy items, Ross McCarty, President of the Rancho Cordova Rotary Club, (the Rotary helped the Elks with this project), Robert McGarvey, Mayor of Rancho Cordova (the City council donated time and money to the project), and Rancho Cordova Police Chief Reuben Meeks, (who, along with the Sacramento Sheriff’s Department provided Explorer Scouts, some “Work Release” personnel, and helped to deliver 100 leftover baskets to families in need in the Rancho Cordova area).

IX. COMMITTEE REPORTS REQUIRED AT VP & DDGER'S VISITATION

The District VP and DDGER need written reports from the following committees when they visit the Lodges:

- Americanism
- Business Practices
- Drug Awareness
- Elks Training
- Golf
- Hoop Shoot
- Lodge Activities
- Membership
- National Foundation
- National Veterans Service
- Major Project (Piggy Bank)
- Public Relations
- Ritual and Ritual Training
- Scholarship
- Scouting
- Youth Activities

Other committees may submit written reports to be included in the VP & DD reports.

X. MANAGING LODGE MEETINGS

A. THE ROLE OF THE CHAIR

- **The Chair is primarily responsible for meeting process**
  - The chair must assure that the meeting is **open, fair and orderly** and supports **effective democratic process**.
- **Key rule: Stay in charge.**
- **Effective Attitudes & Behaviors**
- **Be unconditionally professional**
  - Maintaining fairness and order is "job one."
- **Graciously stay in charge of the process**
  - Be **assertive** about process.
  - If necessary,
    - use your gavel,
    - **speak ove**r a person who should not be speaking,
    - **raise** your voice, then lower and drop your voice when the person stops speaking,
    - **stand up** if you are not already standing, or
    - if several people are speaking at once, tell them to stop and then:
    - remind them of the rules of order,
    - assure them that all will have an opportunity to speak, and
    - Recognize the next in order.
  - It's OK to let people answer questions that have been asked; limit them
    - However, to answering the question before moving on to the next person.
- **Never get angry!**
  - Getting angry demonstrates that you are losing control.
  - Even if you feel angry, do not show it. Stay cool!
  - The members count on you to be the calm in the middle of the storm.
- **Never make it personal!**
  - Making it personal detracts from the perception of neutrality.
  - Making it personal will be perceived as a personal attack.
  - Instead, remind people of the meeting ground rules—which they approved!
  - Quietly and firmly insist people follow the agreed upon rules.
- **Maintain a sense of humor**
  - Nothing lightens a discussion and reduces tension better than humor!
- **The meeting process always belongs to the members**
  - The chair works for the members, not vice versa.
  - The members can always overrule the chair, provided they follow the House Rules or Roberts Rules in doing so.

B. Managing Difficult Members

- **Examples of behavior problems**
  - Belligerent member—towards you or another member
  - Profanity
  - Personal comments and attacks
  - Argument between two members
  - Member who interrupts
  - Member who will not stop talking
- **Basic principles:**
  - Good meeting behavior is based on a set of group norms contained in your bylaws and house rules.
    - You are the chair by agreement of the group.
    - The behavior conflict is **essentially between the group and the member,** NOT between you and the member.
  - **Stay in charge**
    - **1st, stay in charge of yourself>**
      - Stay calm; bank your own anger.
      - NEVER take it personally.
      - NEVER make it personal.
      - Be unconditionally professional!
  - **Hold the member accountable to the group,**
    - by insisting that he or she honor its norms—
      - the rules of the meeting and
      - Conduct becoming an Elk.
- **How?**
  - **Calmly, but persistently, interrupt the person**
    - If necessary,
      - talk over the person until he or she stops and
      - use your gavel.
    - Say that you have an issue of order—then stop all discussion.
  - **Remind the person(s) of the rules of conduct or meeting rules.**
    - If there is no rule specifically on point, tell the member that
      - one of the rules is be respectful, and
      - part of being respectful is to **do whatever it is you want him or her to do or stop doing>**
      - **Always treat the member with respect.**
        - E.g., “I understand the point you are trying to make and we have to do business as a group respectfully and by our agreed upon rules.”
        - Keep coming back to the needs of the group.
        - Be even handed. Hold everyone to the same standards
        - Speak to his or her best nature.
      - Act as if you expect them to understand and do the right thing. Tell him or her that you know they will.

- **If they are arguing with each other,**
  - ask them to address their comments to the chair and/or the group
  - rather than the person.
- **If they are using profanity, making personal comments or attacking,**
  - tell them to address the issue without getting personal.
- **If they will not stop the behavior,**
  - Tell them to sit down until they feel calm, then you will recognize them.
  - Do not proceed until they sit.

Believe in your own power to control the meeting. Confidence is the key!

> *Whether you think you can or think you can't, either way you are right.*
> ***Henry Ford***

C. Managing Committee Meetings

- **Preparation**
  - **Be clear about the purpose of the meeting.**
    - What do you want as the outcomes?
    - Who should attend?
  - **Develop a tentative agenda in advance.**
    - Put items in logical order.
    - Designate which items are informational and which require decisions
    - Decide in advance, who will present the information on each item.
    - Estimate the amount of time you want to spend on each issue.
  - **Prepare materials for the issues about which the group will need to make informed decisions.**
- **Opening the meeting**
  - **If the group meets regularly, develop a set of mutually agreed upon ground rules**
    - Examples
      - One person speak at a time; no interruptions.
      - Ask questions to clarify because responding.
      - No personal attacks.
      - Treat each other with respect.
      - If several want to speak at once, wait to be recognized by the chair.
      - Stay on task.
      - Be succinct.
    - Process
      - Bring a set of proposed ground rules to the meeting.
      - Ask for additional suggestions.

        - Discuss any rule about which they have questions.
        - Ask for commitment to the rules.
        - These ground rules will apply to all subsequent meetings.
    - **Review the proposed agenda with the group.**
        - Ask for suggestions to add, delete or change order.
        - Get agreement to the agenda.
- **Running the meeting**
    - **Keep the group focused on the item under discussion.**
    - **Guide the group towards the desired outcome.**
        - If the goal is to inform, make sure they understand and then move on.
        - If the goal is to decide, let them through a decision making process.
    - **When they need to make a decision, use a simple problem-solving format.**
        - What is the problem or issue we need to resolve?
        - What do we know about it?
        - What are our needs? (as opposed to solutions)
        - What are options? (possible solutions)
        - Which options best meet our needs?
        - Choose.
    - **Help the group get "unstuck"**
        - If the group is stuck in a debate between two options or proposals, encourage them to look for "both ... and" rather than "either ... or" solutions.
    - **Decide by consensus whenever possible.**
        - You will get much higher buy in and support when implementing if you decide by consensus.
    - **Postpone to a date certain if you lack enough information to make an informed decision.**
        - Identify what information is needed and how to obtain it.
        - Decide who will get the information and bring it to the group.
        - Set a date to continue discussion of this issue.
    - **Let others speak to an issue before weighing in.**
        - Your first job is to make sure the group process works.
        - However, freely ask questions to clarify what people mean and guide the discussion.
    - For example, if someone is stuck on whose fault a problem is, ask him how he or she might solve the problem.
    - Manage time.
        - Try to keep discussion on an issue within the timeframe you projected.

        - If people are speaking too long, ask them to be succinct.
        - If they are repeating themselves, ask whether they have anything new to add.
        - If they are dominating, ask to hear from those who have not had an opportunity to weigh in.
- **Wrapping up**
    - Pin down next steps.
        - **Who** will do **what** specifically and by **when**?
    - Identify items for the next agenda.
    - Thank people for their participation.

D. Roberts Rules of Order Simplified

1. General Considerations

- **Roberts Rules were created to provide a process for <u>fair and open debate</u> and decision-making.**
- **Roberts Rules are not helpful for exploratory discussion or creating consensus.**
    - Do not be a slave to Roberts Rules.
        - Theoretically, no discussion should occur until someone makes a motion.
        - If you insist on a motion 1st, people will speak for and against the motion **before** they have explored the problem, the lodge's needs and a range of possible solutions. It causes premature evaluation.
        - Some exploratory discussion before a motion is made can be healthy and helpful.
    - In small meetings, such as committee meetings, be less formal.
        - However, always make decisions by motion, second and vote.
- **Statutes, Bylaws and House Rules are always trump Roberts Rules.**
    - For example,
        - Under Roberts Rules, anyone can move to adjourn at any time.
        - Under Elks rules, you must complete the full agenda at a lodge meeting except in a true emergency.
    - **Read and know your Lodge Bylaws and House Rules.**

2. USING ROBERTS RULES

- **Making a motion**
  - A "motion" is a proposal to take a particular action.
    - No discussion of a motion should occur unless it is seconded.
    - If it is not seconded, the motion dies.
    - Once the motion has been made and seconded, discussion can start.
    - Ordinary motions are approved by a majority vote.
  - The chair may not make a motion.
    - The chair can suggest a motion by saying,
      - "I would entertain a motion to . . . ." or
      - "Would someone like to make a motion to . . . ?"
- **Debating a motion**
  - Keep track of who raise their hands in what order when a motion is being discussed.
    - If necessary, make notes on the order of raised hands.
    - Then tell them the order in which you will recognize people, such as
      - "I will recognize Tom, Joan and then Jim."
    - Then they do not need to keep their hands up.
    - If keeping track of names is too distracting, ask another officer to do so, such as the Leading Knight.
- **At lodge meetings, insist that members stand when recognized** unless they are disabled.
- **Do not let members get into a back & forth debate** without first being recognized.
    - Insist that they do not interrupt each other.
    - Insist that they raise their hands.
  - Generally, do not allow a person to speak a second time until all who desire have had the opportunity to speak.
    - Roberts Rules allows the chair to limit comments to one per person.
    - Only do so when you anticipate debate would be too lengthy otherwise.
  - Roberts Rules require that you rotate between those speaking in favor and those speaking against.
    - Ignore this rule unless one side is dominating.
  - The chair <u>may not</u> speak for or against a motion.
    - However, the chair can hand the gavel off to the next officer (e.g., Leading Knight) and then speak for or against a motion.
    - If you choose to do so, wait until all the other members have had an opportunity to comment.

- The chair may always provide background information or answer questions relevant to a motion.

- **Voting on a motion**
  - Always call for the hands of those opposed as well as those in favor.
  - Do not call for “ayes” and “nays.” The Elks always vote by raising hands.
- **“Call for the question”**
  - This is a suggestion to the chair to shut off debate.
  - The chair has discretion to decide whether to do so.
- **Motion to “end debate” or “move the previous question**
  - A member may make this motion at any time during debate.
    - Second required.
    - Debatable.
    - Must pass by **two-thirds**.
- **Amending a motion**
  - A member may move to amend the original motion in two ways:
    - Friendly amendment
      - The person suggesting the amendment asks the maker and the seconder to accept the proposed amendment.
      - If both the maker and seconder agree, the motion is amended.
    - Amendment by vote
      - When the maker and seconder will not agree to amend, a formal motion to amend must be made.
        - Requires a second.
        - Debatable
        - Takes majority approval
    - After the members approve or reject the amendment, complete debate and vote the original motion—as amended or not.
- **Motion to “table”**
  - A “motion to table” sets the original motion aside (on the table) indefinitely.
    - Requires a second
    - No debate
    - The motion must pass by a Majority.

    - The motion “stays on the table” until someone moves to “take it off the table.”
        - Requires a second
        - No debate
        - The motion must pass by a **Majority**.
        - **The chair may <u>not</u> table** a motion on his own without a vote. However, the chair may suggest a motion to table.
- **Motion to “postpone”**
    - A “motion to postpone” delays the rest of debate and the vote until a specific date.
        - Requires a second
        - Debatable
        - Takes majority approval
        - The chair may not table a motion on his own without a vote. However, the chair may suggest a motion to postpone.
- **Point of order or “process check”**
    - A “point of order” is a question or statement about how the meeting is being conducted, proper procedure or the meeting rules.
    - Any member can make a point of order, object to a procedure or raise a process issue at any time.
        - The member may even interrupt the speaker to do so.
    - The chair rules on the point of order, not the members. The point of order is not debatable.
    - For the sake of transparency and respect, the chair should explain his ruling, even though he need not.
- **Appeal of a ruling of the chair**
    - The meeting process always belongs to the members.
    - Any member may appeal a ruling by the chair on a point of order.
        - Requires a second.
        - Debatable.
        - Requires a majority to overrule the chair.
- **Other motions** are rarely used.

XI. PROTOCOL

Customs, Courtesies and Etiquette Guide for Hosting Elk Ceremonies and Special Events

A. Preface

Protocol is the particular customs, courtesies and regulations that are followed when a ceremony or an event is being conducted within an organization. Protocol is the constant, unchanging and predictable foundation for each ceremony or event. It is the etiquette of how to properly interact with others during both formal and informal activities.

The Elks have a long and grand history. Over time, traditions and rituals have been created that were unique to Elks, then handed down from generation to generation because the Elks is such a large organization with a constant flow of members moving into leadership positions, Grand Lodge recognized that a common set of customs and courtesies, based upon those traditions and rituals, were necessary to properly conduct our various ceremonies. Thus, Grand Lodge published the *"Manual on Protocol"* (Code 510600), which is the ultimate guidance on all protocol issues.

This Protocol Customs, Courtesies and Etiquette Guides' purpose is to: First, Help new Exalted Rulers and their spouses better understand some of the complexities of Elkdom – at the national level, within the California-Hawaii Elks Association, and within the District. And second, to provide guidance and suggestions on how to ensure that proper protocol is followed as they prepare for and host the three main events of each Elk Lodge: Lodge Officer Installations, and official visitations of both the District State Vice President and the District Deputy Grand Exalted ruler.

B. Exalted Ruler & Spouse Protocol Overviews

Protocol

The major points of protocol in hosting a visitation or installation are:

- The Invitation
- Coordinating with special guests
- Preparing the Lodge and its Officers
- Receiving and providing for special guests
- Entertaining spouses
- Hosting a visitation dinner
- Proper seating
- Introductions
- Sequence of events (the script)
- The protocol of gifts
- After the event expectations

Getting Prepared

As excellent as it is, the Grand Lodge Protocol Manual does not prepare you or your spouse for the hard work, and all the details you have to deal with, to properly host an event in the district. Information provided in this guide along with the Protocol Checklist should help you and your spouse with general background information on the Elks, and what the State Vice President and

Deputy Grand Exalted Ruler visitations are all about, and an overview on what to expect at each one. Since these visitations typically include both an official business meeting and a special dinner, the guide also provides you with general suggestions on the planning needed and the protocol expected of you as a host.

The **Protocol Guide** includes:

- Order of Precedence (who is senior to whom in Elkdom, and how you acknowledge that)
- Invitation Lists (who do you normally invite to what, and when)
- Dress Code Definitions (selecting the proper clothing requirement for your event)
- Lodge Officer Installations (how to organize and conduct an installation)
- CHEA SVP Visitation Background (what is it, why is it done, what is expected of you)
- DDGER Visitation Background (what is it, why is it done, what is expected of you, and what are the results you can expect)
- Elks Overview – Quick Notes for Spouses (what are Grand Lodge, CHEA, ENF, Major Project, Jamboree, DDGER's, the protocol of gifts and entertaining visitors, continuity books, etc.)

By The Numbers

The **Protocol Checklist** is your second tool. It is a hands-on checklist designed as a systematic guide in planning for, organizing, and conducting the actual event. It is hoped that you will use often.

Additional Reference Material

The **Exalted Rulers Guide** is a ready reference of compiled information from Grand Lodge Manuals; Statutes; Grand Lodge Protocol Manual; important dates for required reports; duties of Trustees / House Committee / Secretary / Treasurer, and Officers, etc.

Assistance

Should you have any questions on what is proper or acceptable, you are encouraged to contact the Past District Deputy Grand Exalted Rulers in your Lodge, and or District Leaders. All decisions are based on the *Grand Lodge Protocol Manual*.

C. Elks Overview: Quick Notes for the Spouse

Grand Lodge refers to the Elks management at the national level. The Grand Lodge offices are in Chicago and the organization maintains a website (www.elks.org). The Order of Elks is over 140 years old.

The ***Grand Exalted Ruler*** (GER) is nominated and then elected at the annual Elks National Convention (also referred as to "The Grand Lodge") and serves for one year. The GER is considered the Chief Executive Officer of the Order of Elks, establishes a motto and goals for the year, and travels throughout the United States representing Elkdom.

The ***Elks National Foundation*** (ENF) is an IRS approved foundation created by the Grand Lodge to receive donations and fund a variety of national programs. Donations are kept in trust and the interest it earns is what is spent each year.

District Deputy Grand Exalted Ruler (often called the DD or DDGER) is nominated by the District's Past District Deputy Grand Exalted Rulers and when selected, is sworn in during the annual Elks national convention in July. The DDGER represents the Grand Exalted Ruler to the District and reports through the Past Grand Exalted Ruler serving this area to the Grand Exalted Ruler. Once appointed, the DDGER is required to visit each lodge in the District, meet with the Officers, conduct a Lodge inspection, review all mandatory documents and manuals, attend a lodge meeting, witness an initiation ritual and deliver any messages from the Grand Exalted Ruler to the Lodge members. An Auditor and Esquire will accompany the DDGER.

CHEA refers to the California Hawaii Elks Association, a nonprofit corporation that encompasses 19 districts within the two states. CHEA was established to coordinate the activities of Elks and their lodges with the two states, conforming to national Elk Grand Lodge requirements.

Association District Vice President is referred to by this District as the State Vice President, and is nominated by the Past District Deputy Grand Exalted Rulers at a special meeting. When selected, the SVP is officially installed at the CHEA convention in mid-May. The SVP serves for one year, and is the representative of the CHEA President to the District. The SVP is required to visit each Lodge, meet with the Lodge Officers and committee chairs, receive and review required committee reports, and deliver any messages from the CHEA President.

Major Project (also called the **Purple Pig**) refers to the main project sponsored within CHEA. Typically, each State creates and operates a major project unique to their area. The California – Hawaii major project provides physical therapy and occupational therapy to needy disabled children in rural areas who would otherwise not receive help. It also funds a child vision-screening program that takes place in all areas of the two states. Donations received for the Major Project are held in trust, and the interest it earns is spent to provide the services.

The term "Purple Pig" also describes the small purple piggybanks that are distributed to those wishing to fill them and are returned as part of the fundraiser program.

Donors are encouraged to drop their spare change into the piggy banks and turn them in. Lodge donations are turned in to CHEA throughout the year, and are tallied at the annual convention, and are normally measured in actual dollars, and dollars per capita (per member).

District Leaders (often called DLs) are appointed by the Past Grand Exalted Ruler for the area to monitor the overall activities of the District on an on-going basis. They not only provide leadership continuity, but also serve as liaison between the District and the Past Grand Exalted Ruler (the Area sponsors), who monitors the area that includes this district. Each district has a DDGER, a SVP and two (2) district Leaders.

The Protocol of a Visitation

Each year, the Lodge hosts two official visits: the State Vice President's and the District Deputy Grand Exalted Ruler's. There are differences in the goals of each visit, but the protocol of each one remains the same.

While specific customs may vary somewhat, according to the practices that have evolved over the years in each lodge, the following items generally apply:

Invitations

- Design invitations to be tasteful and informative.
- Invitations should include subject, date, time, location, dress code, menu, cost, RSVP contact and deadline, driving directions and a list of nearby accommodations. Include the phrase "RSVP Acceptance Only", eliminating non-attendance responses.
- Prepare the mailing list to include all appropriate individuals as per protocol manual, including the dignitaries themselves, District Leaders, Past District Deputies, Pas State Vice Presidents, District Committee Chairs and current Exalted Rulers from other Lodges and State Chairmen located within the District.
- Mail the invitations at least 30 days prior to the event.
- Assign RSVP duties to one person.

Visiting Dignitary Lodging

- Reserve and prepay for lodging of visiting DDGER or SVP as necessary.
- Reserve and prepay for the traveling Auditor and Esquire.
- Arrange and greet the arriving dignitaries and provide appropriate snacks, beverages and a "welcome basket" for their stay. Welcome baskets may contain a bottle of wine/ cork pull / glasses, fruits & nuts, candies, cheese & crackers (with spreader), napkins & paper plates, or other assorted items to cheer the guests. It is suggested that a tactful phone call to discover the guests' preferences be made before putting the basket together.

Entertainment

- Be prepared to provide dignitary spouses and non-members some form of entertainment during periods when the dignitary and members are involved with official duties. Entertainment may, but are not required to include, tours of local areas or special sights. Any entertainment should be coordinated with the spouses beforehand.

Visitation Dinner

- Arrange for a reception and dinner to introduce visiting dignitaries.
- Seat all visiting dignitaries at a head table in appropriate seating format as diagramed in the “Protocol Checklist Guide”.
- Provide complimentary meals and refreshments to dignitaries.
- It is customary to provide a gift from the Lodge Members to the DDGER or
- SVP that is indicative of your Lodge to the dignitary’s spouse. Please refer to the “Protocol Checklist Guide”.
- Be prepared to supply a corsage for both the visiting dignitary’s spouse and the host Lodge ER spouse.
- Be prepared to introduce certain specific guests, but remember that the focus is on the dignitary, not the visitors and guests. Please refer to the “Protocol Checklist Guide”.

Remember that communication with the visiting dignitaries and spouses is extremely important to ensure proper clothing is brought, lodging is provided, proper courtesies of the office are provided, and an enjoyable time is experienced by all.

Quick Points

- Proper Protocol Is Expected
  - Use the Grand Lodge Protocol Manual as primary guidance.
  - Use the *Protocol Guide – Customs, Courtesies, Etiquette Guide* for detailed info.
  - Use the “Protocol Checklist Guide” as you put your event together.
- Plan ahead
  - The actual “Elk Year” begins first day in April and ends the last day of March each year.
  - Obtain a 2-year calendar and place all events on it.
    - Lodge events(visitations, dinners, fundraisers, required annual events, etc)
    - District events (DDGER & SVP visitations to other Lodges, district events / conferences / workshops)
    - State events (CHEA convention, CHEA Presidents visitation, Mid-term)
    - National events (Grand Lodge Convention
  - Refer to the annual District Directory for dates & locations of various important events.
- Expect to incur some expenses:
  - Phone & postage.
  - Travel & dinners at other Lodge.
  - Thank-you cards and small gifts.
- Maintain a “Continuity Book”

- Acquire the current book from the spouse or immediate Past Exalted Ruler.
- In none exists, create one for your future replacement
- Keep the book up-to-date

- Non-members are strictly visitors
  - A visitor is a potential future member, eligible to attend certain functions, but not eligible to attend others, such as Lodge meetings.
- Plan to attend all Lodge events and functions
- Plan to attend all District events and functions:
  - Exalted Rulers, Leading Knights, Secretaries and Trustee Chairmen are mandated to attend all DD Clinics unless a specific written absence request is submitted to and approved by the DDGER.
  - Exalted Rulers are expected to attend the CHEA President's official visitation to the District SVP's Lodge. ERs and spouses will participate in the presentation of District's gift to the President. A donation from your Lodge for the gift is budgeted for.
  - The District organizes and conducts an annual Jamboree. The event has two (2) main goals:
    1. To provide an opportunity for fun and fellowship among the Districts members and spouses; and
    2. To raise funds to pay for a variety of District activities throughout the year, including Ritual competition, and funds for various District Committees.
  - The host Lodge will host breakfasts and dinners during the Jamboree as fundraisers for the Lodge itself. All Lodge Officers are encouraged to attend the Jamboree. Each Lodge normally brings an outdoor game, fields a team and competes for fun prizes. A chili cook-off usually takes place and Lodges are encouraged to participate.
  - The District Past Exalted Rulers Association coordinates the Jamboree ticket sales and each District Lodge is encouraged to participate in the annual distribution and sales of tickets to their members.

- Plan to Attend the CHEA Convention
  - Exalted Rulers will purchase their State ER "Blue Coats" in advance, and actually pick them up at the convention.
  - Exalted Rulers will turn in their Lodge Major Project donations, and formally walk up on stage and announce their donations.
  - A number of classes are given to provide ERs and Lodge Officers with up-to-date information on CHEA operations and requirements.
  - A special luncheon is offered for spouses, as are various entertainment opportunities.
  - A semi-formal dinner is held to introduce the new CHEA President.
- Plan to Attend the Grand Lodge Convention
  - The Lodge Exalted Ruler is required to attend the Grand Lodge Convention.

- By registering and attend the Grand Lodge Convention, the ER can become a member of Grand Lodge. To do so, the ER must attend the Grand Lodge sessions and vote his credentials.
- In attending the Grand Lodge Convention, the ER will represent their Lodge in voting on proposed changes to the Grand Lodge Constitution and Grand Lodge Statutes.
- A formal “White Tuxedo Jackets” dinner and reception is hosted by and for Area 7 Sponsors and Members. Spouses wear is formal.
- The District’s new DDGER is sworn in at the Convention.
- Each ER and spouse may be assigned certain duties by the DDGER at the Convention, such as “seat saving”.
- Special entertainment is scheduled for spouses, sometimes including day trips.

- Perfect Your Hostess Skills
  - Plan to introduce visitors to the Lodge to others in attendance
  - Mail thank-you cards and notes at every opportunity
- Get to know your DDGER / ER team mates
  - Traditionally, the incoming DDGER and spouse become team leaders for the new group of district Lodge Exalted Rulers and spouses.
    - The ERs normally select a unique team name and logo that stays with them throughout their future years in Elkdom.
    - The team assembles and participates in Grand Lodge Convention activities together, and works together throughout the year to help each other and work on common problems.
    - All Lodge ER’s and spouses are expected to attend the DDGER’s homecoming visitation.

D. Defining the Elk Dress Code

When planning a particular event, stating exactly how guests should dress is the best policy. This normally eliminates confusion and makes wardrobe planning easier for those who are traveling to the event. It goes without saying that clothing is expected to be tasteful and appropriate to the weather and the occasion.

Sports Attire

Men: Jeans, Bermuda shorts, T-shirts / sports shirts, walking/ tennis shoes.

Women: Jeans, knee-length shorts, tank tops and T-shirts, walking/tennis shoes.

Western Attire

Men / Women: Jeans, cowboy shirt, boots, hat, bandanna

Casual (comfortable unrestricted)

Men: Short or long-sleeved open neck shirt (no tie), casual slacks, casual shoes (loafers, etc.). Sweaters or casual sport coats or blazers may be worn. “Open Collar” or “Sport shirt” are both synonymous with “Casual”.

Women: Any casual dress or slacks/ blouse/short or long-sleeve shirt.

Sport Coat and Tie

Men: Short or long-sleeved dress shirt with tie, blazer or sport coat.

Women: A dress or dressy slacks & coordinated blouse outfit.

Informal or Coat & Tie

Men: Short or long-sleeved dress shirt with tie, conservative business suit, dress shoes.

Women: A dressy suit or dress.

Business Suit

Men: Short or long-sleeved dress shirt with tie, conservative business suit, dress shoes.

Women: A dressy “street length” dress.

Formal (Black Tuxedo)

Men: Black Tuxedo with black tuxedo tie and cummerbund or vest, formal shoes.

Women: Tea-length dress or floor-length formal evening dress (corsage when appropriate)

E. Invitation Lists

District Deputy Grand Exalted Ruler Visitation

District Deputy Grand Exalted Ruler & Spouse
DDGER's Esquire & Spouse
DDGER's Auditor & Spouse
District Leaders & Spouses
CHEA State President & Spouse
CHEA State First Vice President & Spouse
District State Vice President & Spouse
State Officers within the District
Past District Deputy Grand Exalted Rulers in District
Exalted Rulers in District & Spouses (mailed to homes)
Each Lodge in District (mailed to Lodge)
All Past Exalted Rulers & Spouses of your Lodge
District Committee Chairs & Spouses

State Vice President Visitation

District State Vice President & Spouse
District Leaders & Spouses
CHEA State President & Spouse
CHEA State First Vice President & Spouse
CHEA Current State Vice Presidents & Spouses
Past State Vice Presidents & Spouses in District
State Officers within the District
District Deputy Grand Exalted Ruler & Spouse
Past District Deputy Grand Exalted Rulers in District
Exalted Rulers in District & Spouses (mailed to homes)
Each Lodge in District (mailed to Lodge)
All Past Exalted Rulers & Spouses of your Lodge
District Committee Chairs & Spouses

Invitations should be mailed out at least thirty (30) days prior to the event. Invitations should not be "flyers", but more the formal 3"x3" invitation format.

Note: In addition to sending an invitation to the visiting dignitary (and their escorts when appropriate), a separate letter or telephone call should be made that provides the dignitary and escorts with information on what is planned for the visit (i.e. dinner time and menu, type of entertainment planned for spouses, special clothing needs, etc.) At the same time, determine whether overnight accommodations will be required (prepaid by the Lodge). If so, a map of the lodging location should also be sent.

F. Order of Precedence

There are three levels of office in the organizational structure of the Benevolent and Protective Order of Elks (BPOE). In descending order, they are:

1. **GRAND LODGE**
    a. Grand Exalted Ruler (introduced by sponsoring Past Grand ER if present)
    b. Grand Forum Members
    c. Past Grand Exalted Rulers
    d. Grand Lodge Elective Officers
    e. Grand Lodge Appointive Officers
    f. Grand Lodge Committee Chairs
    g. Grand Lodge Committee Members
    h. District Leaders (CHEA) or Special Deputy Grand Exalted Rulers
    i. District Deputy Grand Exalted Rulers
    j. Past District Deputy Grand Exalted Rulers
2. **STATE ASSOCIATION**
    a. CHEA State President
    b. CHEA State First Vice President
    c. Past CHEA State Presidents
    d. State Elective Officers
    e. Appointive Officers: Chaplain, Tiler, Sergeant-At-Arms, Committee Chairmen and Committee Members
    f. State Vice President
    g. Past State Vice President
3. **SUBORDINATE LODGE**
    a. Exalted Ruler
    b. Past Exalted Rulers
    c. Elective Chair Officers: Leading Knight, Loyal Knight, Lecturing Knight
    d. Other Elective Officers: Secretary, Treasurer, Trustees, Tiler
    e. Presiding Justice
    f. Appointive Officers: Esquire, Chaplain, Inner Guard
    g. Committee Chairman
    h. Committee Members

Introduction Protocol

When distinguished guests are present at an event or ceremony and officials are being presented, their introductions should be made in reverse order of precedence: first, the subordinate Lodge; second, the State Association; and third, he Grand Lodge. If the Grand Exalted Ruler is present, his introduction will be made by the sponsoring Past Grand ER if one is present.

G. Lodge Officer Installation Guidelines

Nomination of Lodge Officers occurs during the first Lodge meeting in February, and elections completed during the second Lodge meeting in February. Installations are to start March 15, and be completed by April 15 of each year. If Officers are installed before April 1, the effective date of the installation will be April 1.

The Lodge Officers are installed in a formal installation ceremony. Installations can be either “open” (allowing non-members to attend) or “closed” (members only). The Lodge normally holds a social function to celebrate the new corps of Officers. The function can be either immediately after the installation or later. The Function can be a reception, a dinner or both.

The Lodge needs to select a date for the installation and social function and begin to plan early. There are eleven (11) Lodges in the District, and only five (5) weekends available. Coordinating with other Lodges will help avoid several Lodges installing Officers on the same date. Some installations have been held on meeting nights (closed) and open installations on Friday or Saturday evenings or Sunday afternoons.

When preparing for the installation, the following guidelines should be included in your planning:

- Tuxedos are traditionally worn by Lodge Officers (both those installing and those being installed), but this is not a rule.
- Installation is a *Lodge Budget Item* so planning ahead will ensure enough funds to cover the event.
- Design and print invitations and mail them at least thirty (30) days before the event.
- Ensure new nametags are available for each incoming Officer and spouse.
- Ensure new Elk lapel pins are available for each incoming Officer if the Lodge so chooses.
- Order flowers, including corsages for the ladies and boutonnieres for Officers, as appropriate.

When preparing for the installation dinner or reception, the following guidelines should be included in your plans:

- Plan snacks, meal and decorations appropriate to the event.
- Design and print invitations and mail them at least thirty (30) days before the event.
- Organize entertainment or background music as appropriate.
- Organize head table seating and decorations in accordance with the Protocol Manual and Protocol Guideline, and Check List.
- Be prepared to provide travel and lodging information to out-of-town guests.
- Include incoming Officers spouses in the plans. Each will be involved and will need to know what is expected.
- Determine whether a gift will be presented to the outgoing Exalted Ruler & spouse.
- If conducting a dinner, organize a Sequence of Events, including the pledge, an opening prayer, introductions, speeches, gifts, and closing prayer.

H. CHEA District VP Visitation/Inspection Dinner

The California-Hawaii Elks Association (CHEA) State Vice President (SVP) is nominated by the District's Past District Deputy Grand Exalted Rulers at a special meeting. When selected, the Vice President designee will be formally installed at the annual CHEA Convention.

As the CHEA President's representative to the District, the SVP will visit each Lodge within the District and assess its committees. The visits usually begin in late May or early June and finishes by Late July. The last lodge visited will be the SVP's own Lodge and celebrated as a "Homecoming". The CHEA President will officially visit the District by formally scheduling an appearance at the SVP's Lodge sometime in early December.

The State President will instruct the Vice Presidents on what type of visitation they should conduct (i.e. attend a Lodge meeting or visit on a non-meeting day). The SVP will not be accompanied by any support personnel, but will usually be accompanied by his/her spouse. Initially, the SVP will meet with the Lodge Exalted Ruler, Lodge Officers and Committee Chairs about 1 to 2 hours. The goal is to discuss operational details of the Lodge and receive written and verbal reports on the activities and effectiveness of the Lodge Committees and special projects. While this discussion is underway, the SVP's spouse should be appropriately entertained.

The SVP's entire visitation schedule can be found in the annual District Directory.

In general, you will need to accomplish the following items for the visitation:

- Ensure your Lodge has no conflicting outings, events or activities scheduled during SVP's visit.
- Put the visitation date on the Lodge calendar and begin planning and organizing.
- Ensure all Lodge Committee Chairs are informed of the visit and understand their role in providing reports, attending the meeting, etc.
- Design your invitations early; ensuring all pertinent information is included (i.e. date, time, location, dress code, menu, price, RSVP contact / deadline, etc.)
- Coordinate with the SVP to confirm his/her lodging requirements (if required), transportation needs, special food requirements, need for particular clothing, etc.
- Coordinate with the SVP's spouse regarding entertainment preferences while the SVP is otherwise involved in performing official duties.
- Include SVP visitation expenses in the annual Lodge Budget.
- Carefully review the invitation mailing list to ensure they are mailed in a timely manner to appropriate individuals, including the visiting dignitary, in accordance with protocol guidance.

Suggestions on the protocol of a SVP visitation:

- Meet the SVP and spouse as they arrive. (If lodging is required meet at hotel, ensure room is adequately stocked with appropriate snacks and beverages/ gift/fruit basket)
- Carefully review the RSVP responses and ensure that seating arrangements and introductions are in accordance with proper protocol. Remember: the focus is on the visiting SVP, and introductions should be kept to a minimum.

- Arrange for and provide the SVP's spouse with a color-coordinated corsage for the dinner/ social event.
- Traditionally, the Exalted Ruler presents a tasteful gift form the Lodge Membership to the SVP during the visitation – normally at the dinner, after the SVP speech at the dinner. The gift, from the Members of the Lodge, should represent the uniqueness of the Lodge. The cost of the gift is budgeted for by the Lodge.

Remember, you are encouraged to talk to those who have planned and hosted these types of events before. Protocol for such a visitation is outlined in several resources including the "Grand Lodge Protocol Manual", Protocol Customs, Courtesies Etiquette Guide and Protocol Check List.

I. District Deputy Visitation/Inspection Dinner

The District Deputy Grand Exalted Ruler (DDGER) is nominated by the Past District Deputy Grand Exalted Rulers of the District. The District Deputy designee is installed in a special ceremony at the Grand Lodge convention.

As a District representative of the Grand Exalted Ruler, the DDGER will visit each lodge within the District and assess its capabilities. The visits usually begin in Early August and finish by October. The last lodge visited normally is the DDGER's own Lodge and celebrated as a "homecoming". All Lodge Exalted Rulers and spouses are expected to attend the homecoming event.

The DDGER will schedule the Lodge visitation with the Exalted Ruler for a Lodge meeting day. The DDGER will be accompanied by an Auditor, and Esquire, and perhaps their spouses as well. Initially, he DDGER and Auditor will meet with the Lodge Exalted Ruler, Lodge Officers and Committee Chairs. Their goal is to discuss operational details of the Lodge, inspect records, inspect the Lodge itself, verify compliance with regulations and confirm up-to-date manuals are on hand. While this inspection is underway, the visiting dignitary spouses should be appropriately entertained.

The DDGER and Esquire will also attend the Lodge meeting. Traditionally, they will be dressed in tuxedos. The goal is to formally introduce the DDGER to the Lodge, have the Officers demonstrated their ability to perform an initiation ritual, and provide an opportunity for the DDGER to present a message from the Grand Exalted Ruler. It is recommended that other business of the Lodge be kept to a minimum on this particular night.

The Lodge will host the DDGER and his/her entourage at a dinner. Tradition in your Lodge will probably dictate your social plans for the visit. The DDGER's entire visitation schedule is located in the annual District Directory.

After the official visitation, the DDGER will prepare a written report and send it to the Grand Exalted Ruler. A formal letter from the officer of the GER acknowledging the visitation and listing the results of the inspection will be sent to the Lodge. Deficiencies and follow-up action requirements will be noted.

In general, you will need to accomplish the following items to prepare for the visitation:

- Ensure your Lodge has no conflicting events, outings or activities during the DDGER's visit.
- Put the visitation date on the Lodge calendar and begin planning and organizing.
- Notify all Lodge Officers of the visitation and confirm their attendance at the Lodge meeting (a practice of the initiation ritual may also be necessary).
- Design invitations early; ensuring all pertinent information is included (i.e. date, time, location, dress, menu, price, RSVP contact / deadline, nearby room accommodations, etc.)
- Coordinate with the DDGER to confirm his entourage, (lodging requirements if needed, special foods requirements, etc.)
- Coordinate with the DDGER's spouse regarding entertainment preferences while the DDGER is performing official duties during the inspection and Lodge meeting.
- When preparing the Lodge budget, include the visitation expenses of the DDGER, the Auditor and the Esquire.

- Carefully review the invitation mailing list to ensure they are mailed in a timely manner to appropriate individuals, including each of the visiting dignitaries, in accordance with protocol guidance.
- Prepare the Lodge meeting sequence of events, including the protocol of receiving and introducing the DDGER.

Suggestions on the protocol of a DDGER visitation:

- Meet the DDGER and spouse as they arrive. (If lodging is required meet at hotel, ensure room is adequately stocked with appropriate snacks and beverages/ gift/fruit basket)
- Carefully review the RSVP responses and ensure that seating arrangements and introductions comply with proper protocol. Remember: the focus is on the visiting DDGER and introductions should be kept to a minimum.
- Arrange for and provide the DDGER's spouse with a color-coordinated corsage for the dinner/ social event.
- Traditionally, the Exalted Ruler presents a tasteful gift form the Lodge Membership to the DDGER during the visitation – normally at the dinner, after the DDGER's speech. The gift, from the Members of the Lodge, should represent the uniqueness of the Lodge. The cost of the gift is budgeted for by the Lodge.
- Traditionally, the spouse of the Exalted Ruler presents a gift to the spouse of the DDGER at the dinner. The gift from the members of the Lodge should represent the uniqueness of the Lodge. The cost for such a gift is budgeted for by the Lodge.

Remember, you are encouraged to talk to those who have planned and hosted these types of events before. Protocol for such a visitation is outlined in several resources including the "Grand Lodge Protocol Manual", Protocol Customs, Courtesies Etiquette Guide and Protocol Check List.

J. Protocol Checklist Guide

Quick Reference List for Successful Protocol

Quick & easy guide to organizing and hosting Official Visits, Special Events and Installation Dinners Based on Grand Lodge Manual on Protocol, the final authority under all conditions

1. Organizing the Event

__ Select committee members to assist
__ Food team __ Photographer __ Building Setup
__ Transportation / Accommodations __ Entertainment
__ Invitation / Attendance Coordination

__ Determine date, time location, “theme” of the event & Dress Standards

__ Organize the Menu
__ Appetizers __ Main Course __ Dessert __ Beverages

__ Design the invitation, table & building decorations, signs, tickets

__ Create a tentative comprehensive “itinerary” including tour activities, special meetings and quiet times

__ Develop Event Agenda / Working Script

__ Coordinate any special entertainment

__ Select & order special gifts (major gift & silver / gold charm, etc.)

__ Confirm the Guest Speaker and speech topic

__ Confirm Master of Ceremonies, Chaplain, Pledge Leader

__ Develop invitation list and print invitations

__ Mail invitations and a list of local accommodations at least thirty (30) days in advance

__ Decide on and order participant / visitor “event souvenirs”

__ Investigate publicity options / put article in Lodge Newsletters

2. Invitation Lists

District Deputy Grand Exalted Ruler Visitation

- District Deputy Grand Exalted Ruler & Spouse
- DDGER's Esquire & Spouse
- DDGER's Auditor & Spouse
- District Leaders & Spouse
- CHEA State President & Spouse
- CHEA State First Vice President & Spouse
- CHEA State Officers in District & Spouses
- District Vice President & Spouse
- Past District Deputy Grand Exalted Rulers & Spouses
- Exalted Rulers & Spouses (mailed to home)
- Each Lodge in District (mailed to Lodge)
- Committee Chairmen in District / Spouses

State Vice President Visitation

- District Deputy Grand Exalted Ruler & Spouse
- DDGER's Esquire & Spouse
- DDGER's Auditor & Spouse
- District Leaders & Spouse
- CHEA State President & Spouse
- CHEA State First Vice President & Spouse
- CHEA State Officers in District & Spouses
- District Deputy Grand Exalted Ruler & Spouse
- Past District Deputy Grand Exalted Rulers & Spouses
- Exalted Rulers & Spouses (mailed to home)
- Each Lodge in District (mailed to Lodge)
- Committee Chairmen in District / Spouses

3. Arrangements for Special Guests

__ Follow protocol for inviting special guests

__ Mail all special guests a copy of the invitation

__ Plan for spousal / non-member entertainment

__ Reserve hotel accommodations / plan for Welcome Baskets

__ Confirm itinerary with Special Guests

__ Confirm types of clothing Special Guests will need

4. Arrival of Special Guests

__ If arriving by air, meet guests at the airport and arrange for luggage pickup and transportation

__ If arriving by car, meet guests at the hotel

__ Provide Welcome Baskets / Refreshments in hotel room

__ Review itinerary & Event Agenda / Script with Special Guests

__ Inform Head Table guests to rest / freshen up

5. Courtesies for Special Guests

__ Provide transportation as needed

__ Provide corsage(s) as necessary prior to event

__ Provide escorts for Special Guests to the event

__ Be prepared to make proper introductions as necessary at events hosted by the Lodge

__ All meals to be complimentary to Special Guests

Are You Ready?

K. Last Minute Issues

__ Confirm “staging” of the event
__ Lectern
__ Microphone / Sound System
__ Lighting
__ Flag
__ Room Decorations __ Table Decorations
__ Head table seating arrangements / place settings / apron
__ Guest tables / seating arrangements
__ Souvenirs
__ Appetizer Table(s): location, layout and decorations
__ Verify foods & refreshments
__ Appetizers
__ Refreshments
__ Food
__ Ice
__ Condiments
__ Confirm supplies (napkins, plates, utensils and cleanup/trash)
__ Confirm support people with Club Manager
__ Master of Ceremonies
__ Chaplain
__ Pledge Leader
__ Entertainment
__ Photographer / Publicity
__ Bartender(s)
__ Servers
__ Cooks
__ Bussers
__ Receptionists / Ticket Cashiers
__ Special Guest Escorts
__ Inspect for Safety (fire extinguishers, first aid kit, etc.)
__ Finalize the Agenda / Working Script

Note: The chaplain’s prayers should be respectful, thoughtful and appropriate.

L. Conducting the Event

__ Perform any special ceremony (i.e. officer installation, etc.)
__ Social Hour / Reception (do not leave special guests alone)
__ Advise dignitaries of their head table seating arrangements
__ Pledge of allegiance / invocation
__ Welcome by Master of Ceremonies or E.R.
__ Introduce Head Table / Special Guests then attending Exalted Rulers & Spouse. Have all other Lodge members stand
__ Serve the meal (head table first), promptly removing dirty dishes
__ Serve dessert / coffee
__ Introduce other visitors & guests
__ Introduce the Guest Speaker / Special Guest
__ Keynote Address
__ Presentation of Awards / Certificates
__ Presentation of Gifts to Special Guests
__ Closing Remarks by Master of Ceremonies or E.R.
__ Closing Prayer

Note: This agenda / script can be used for most District events, including an officer installation or an official DDGER / SVP visitation dinner. Add or remove items to reflect the individual character of the actual event.

M. DDGER Visitation: Suggested Head Table Seating

AUDIENCE

O ----------GL / GL Dignitary
O ----------Other GL / DL Dignitary Spouse
O ----------DDGER Spouse
O ----------DDGER
O ----------M.C. / ER

□– – – – – – – – Lectern

O ----------State V.P.
O ----------State V.P. Spouse
O ----------Other State Dignitary
O ----------Other State Spouse
O ----------Other State Dignitary Spouse
O ----------Other Dignitary

Note: Do not place ladies at end seats. Refer to Grand Lodge Protocol Manual on recommended seating arrangements for other events.

N. State VP Visitation: Suggested Head Table Seating

AUDIENCE

O ----------Other Dignitary
O ----------Other State Dignitary Spouse
O ----------State V.P. Spouse
O ----------State V.P.
O ----------M.C. / ER

□– – – – – – – – Lectern

O ----------DDGER
O ----------DDGER Spouse
O ----------Other GL/DL Dignitary
O ----------Other GL/DL Spouse
O ----------Other GL Dignitary Spouse
O ----------Other GL/ Dignitary

Note: Do not place ladies at end seats. Refer to Grand Lodge Protocol Manual on recommended seating arrangements for other events.

O. Introduction Guidelines

Introducing the Head Table (first)

For formal or semi-formal banquets, where a distinguished speaker is present, only those seated at the head table shall be introduced. If some other dignitary is present in the room, he/she shall also be introduced.

- By reverse order of precedence (see below)from left to right
- Introduce the Honored Guest & spouse last
- Use full and correct current titles

Introducing Guests (second)

For informal occasions that are designed for socializing, introductions should be kept at a minimum. If the host elects to introduce those in the room, it should be done by group (i.e. “Will all Past State Vice Presidents please stand”, etc.). Attending Exalted Rulers and spouses shall be introduced. Then have all other Lodge members stand.

Order of Precedence

When introducing the Head Table, and if the host elects to introduce the assembled guests (whether by group or by individual), the reverse order of precedence shall be used. See Grand Lodge Protocol Manual, page 4.

P. After the Event

__ Check the Special Guests out of the hotel / pay room charge

__ Provide escorts / transportation to airport if necessary

__ Provide baggage handling as necessary

__ Process Pictures (create CDs / prints as necessary)

__ Prepare “Thank-You” cards and mail them (include pictures and or CDs where appropriate)

__ Issue press release, with copy to District Public Relations Chair

__ Prepare follow-up article for Lodge Newsletter/Bulletin, with a copy to District Public Relations Chair

PROTOCOL CHECKLIST

FOR STATE VICE PRESIDENT AND DISTRICT DEPUTY GRAND EXALTED RULER VISITATIONS

Lodge Name_____ Date _____

Visit or Activity_____

1. Greeted upon arrival at Lodge _____
2. A Lodge member with you at all times _____
3. Correct seating arrangement at head table _____
4. Correct placement of flags at head table _____
5. Proper name tags and titles _____
6. Flag salute _____
7. Prayer _____
8. Introductions of members and guests in proper order _____
9. Introductions of head table with proper titles _____
10. Proper identification and pronunciation of names and titles _____
11. Deduction of 10 points for use of MC _____

XII. STEPS TO INAUGURATE A SUCCESSFUL MEMBERSHIP CONTROL PROGRAM

A. Preparation

The Exalted Ruler must study the entire Membership Manual. The Chairpersons of the Membership Committee, the Indoctrination Committee, Lodge Activities and the Lapsation Committee must study at least the portions of the Manual that affect their parts of the Membership Control Program. Lodge Activities are essential to Membership appeal and retention.

B. Management Team

Together with the Secretary, who must also be familiar with the entire Manual, these members constitute the Membership Management Team for the Lodge. After studying the Membership Manual, this team should draft a definite Membership Control Program for the Lodge utilizing the ideas, plans and suggestions in the Manual.

C. Goals

We always do better when we are challenged to meet specific objectives, so definite goals should be set. The goal suggested for Membership Procurement for the year is to add to the roll not less than 10% of the membership total at the beginning of the year. In other words, if the membership of the Lodge was 700 on April I, during that Lodge year at least 70 members should be added to the roll. The goal for Lapsation is to close the Lodge year with a total of 2% or fewer members dropped for non-payment of dues and 6 months in arrears in dues based upon the membership at the commencement of the Lodge year. Thus, in order for the membership program to meet this goal, a Lodge commencing the year with 700 members should not have more than a combined total of 14 members dropped or owing 6 months dues at the completion of the Lodge year.

D. Program

When the program has been defined and the goals established, meetings of the Membership Committee, Lapsation Committee, and Indoctrination Committee should be held, including the whole complement of each Committee. At these meetings, the entire program of each Committee should be explained and adjustments made based on acceptable suggestions from the members of the Committees. Everyone must understand the program and the goals. Everyone must be enthusiastic and believe the program is possible of achievement.

E. Evaluating Results

In the back of the Membership Manual, there are twelve Membership Statistics charts, one for the end of each month. The Secretary must fill in the figures on the appropriate chart promptly each month so the Membership Management Team (see 2 above) can review the condition of the membership on the first of each month. This allows the management, headed by the Exalted Ruler as the chief executive, to discover promptly any portion of the Membership Control Program that is not succeeding and to strengthen it with increased emphasis or new ideas. If this plan is NOT followed, the year may be over before it is discovered that the goals are not being attained. At that point in time, it is usually too late to make successful corrections.

F. Accomplishments

The stronger you stress membership to the Lodge and in all of your associations with the Lodge Officers, the more likely the Lodge will be able to achieve the goals. Start as early as possible and do not let up until the Lodge year has been completed. Again, as mentioned before, the District Deputy shall work closely with the State and District Chairpersons and should work with them in their efforts to control Lapsation.

This suggested program is the application of known methods of good business - make sales and collections. If your present program is faltering, try this plan.

XIII. ORIENTATION OF NEW MEMBERS

Membership and Lapsation are problems for nearly every Lodge in the Order. Officers and Members at every level of Elkdom have spent countless hours seeking cures. What may be needed most, though, is a healthy dose of prevention.

We need to do a better job of informing new Members about our aims, purposes and objectives. We need to show them "What It Means to Be an Elk" and do it early, while the appeal that first attracted them to our Order is still fresh. That is what the Orientation Program is all about.

> We need to show them "What It Means To Be an Elk," and do it early, while the appeal that first attracted them to our Order is still fresh.

A good Orientation Program has three functions:

- Exposing candidates to the camaraderie found at an Elks Lodge,
- Opening avenues to participation in Lodge activities, and
- Making them proud to become part of an organization with such an outstanding record of service to others.

The goal is to connect with each candidate on at least one of these points. The Member who develops friendships with other Elks will remain an Elk. The Member who uses the Lodge as an outlet for helping others will remain an Elk. And the Member who understands that their annual dues help support and perpetuate worthwhile charitable activities, even if he or she doesn't actively participate in these activities or take advantage of the Lodge's facilities, will remain an Elk.

The candidate with whom we do not connect, however, will undoubtedly wind up on the Lapsation rolls, which is why it is so important to have a formal and consistent Orientation Program.

A. Pre-initiation Meeting

A week before an initiation, the Orientation Committee (which is appointed by the ER at the first regular meeting after installation) should invite all the candidates to a dinner meeting at the Lodge. This evening should be exclusively for the candidates, so do not schedule the meeting on a regular Lodge meeting night or in conjunction with another Lodge activity.

The invitation itself will make an impression, so if you choose to do it by letter, make sure you address the candidate by name and not as "Dear Candidate." *(Using a simple mail-merge operation in a word-processing application, you can plug personalized information into a form letter.)* Personal invitations will tell your candidates that in your Lodge, they are going to be more than just numbers.

Whether the invitation is by card or letter, it should include the time, location and purpose of the meeting, as well as a stamped postcard addressed to the Lodge for the candidate's reply. Also, consider inviting the candidate's spouse to attend, not only because the spouse is a potential member, but also because his or her support will likely be necessary if the candidate is to become and remain an active Elk. Finally, invite the candidate's proposer to the meeting and ask him or her to personally contact and encourage the candidate to attend.

Therefore, for the dinner and meeting, you should invite your candidates and their spouses, the candidates' proposers, the Orientation Committee, and the Lodge Officers.

During the meeting, we want to thoroughly orient the candidates to the charitable and philanthropic works of the Order, but we also want them to feel welcome and to have fun.

Be sure to seat the proposers with their candidates. They are the bridge between the candidates and the assembled Lodge Members. Also, try to seat a Lodge Officer or Orientation Committee Member at each table during dinner and, at the very least, have an Officer or Committee Member visit each table. Treat dinner as if it were your only chance to expose the candidate to that Lodge camaraderie we like to boast of. Let the Officers and Committee Members, and any other Members present, know that they must bend over backwards to welcome the candidates.

The meeting should begin after dinner and should be conducted by the Chairperson of the Orientation Committee or by a qualified Member designated by the Chairperson.

The Chairperson should begin by introducing him or herself, the Orientation Committee Members and then the Officers. Then, he or she should ask the candidates to stand and introduce themselves. Ask a few questions to get them going: Are you married? Do you have kids? Where do you live? What do you do for a living? Do you have any hobbies? Who is your proposer?

If time permits, ask the rest of the assembled Members to stand and give their names. *(Use your best judgment here. If 100 people attend the meeting, you may want to ask them to introduce themselves to the candidates after the program.)*

Once everyone is better acquainted, begin the video presentation.

Video Presentation: In 2000, the Grand Lodge professionally produced a 6:33 minute video featuring segments on the "Hoop Shoot®," Drug Awareness, Veterans Service, State Major Projects, *The Elks Magazine,* the Elks National Home, the Elks National Foundation, and other programs. The video, which will be updated periodically, is intended to replace the old slide show presentation. Its Code is 533200, and it can be purchased from Grand Lodge for $20.

Some Lodges have taken the video presentation a step further by producing videos of their community works. This is an excellent idea. Specific examples of the Lodge at work can only enhance the overview given in the Grand Lodge video.

Producing your own video or slide presentation is not as difficult as it sounds. If you ask around, you should be able to find a Member or two who are comfortable behind a camera. Instruction on producing videos is available at local cable access stations, as are the tools necessary to edit footage.

Speakers: Follow the video presentation with short talks on the State Association, the organization of the local Lodge, the camaraderie and fellowship of an Elks Lodge, and any topics that may be unique to your Lodge. Line up a speaker for each topic and give them plenty of time to prepare a short (preferably no longer than five minutes), informative presentation.

State Association: Explain the aims and purposes of the association, as well as its organizational framework (officers, major committees, etc.); its history; the Major Project, including fundraising; and the various statewide activities, such as ritualistic contests, Veterans Service, Americanism, scholarships, service pins, bowling, golf, etc.

Local Lodge: Present an organizational chart of the local Lodge, including the names of the Officers, their stations and their duties, and explain the function and duties of the various Committees. Also, inform candidates about the:

- Available facilities, including building and club hours, meals served, golf, swimming, etc.;
- Social activities for Members as well as privileges extended to spouses and families;
- Charitable work of the Lodge and the means of raising the funds for it;
- Programs of the Lodge in progress and planned for the future;
- If time permits, ask the rest of the assembled Members to stand and give their names. (Use your best judgment here. If 100 Mandatory services of the Order and their obligation to attend, and; Special local rules of the Lodge and club.

Fellowship: Emphasize that the Elks is a charitable and patriotic Order founded on good fellowship. Explain that the Lodge is a place to meet old friends and make new ones, and that new members will benefit most from frequent attendance not only at social functions, but also at the Lodge's charitable functions.

But, again, we can talk about the camaraderie found at Elks Lodges until we are blue in the face, but it is far more important that this fellowship be on display throughout the evening. At the end of the evening, the candidates will ask themselves several questions. Did I have fun? Did I feel welcome? Did I meet new people? If the answer is "NO" to any of these, they will throw whatever you told them about the fellowship at your Lodge right out the window.

We can talk about the camaraderie found at Elks Lodges until we are blue in the face, but it is far more important that this fellowship be on display throughout the evening.

The hand that you extend on this night is the candidates' link to greater involvement in the Lodge. Once extended, it is up to the candidates to grab it, but if you pull it away before they do, they will likely end up on your lapsation rolls. So tell the candidates how much they mean to the Lodge. Welcome their input and assistance. Invite them to participate in Lodge functions and programs. Explain that the return they will get on their membership will be in direct proportion to what they put in. But above all, remember that how the Members assembled that night treat them will carry much more weight on this subject than what the speaker says.

About Initiation Night: Close the meeting by reminding the candidates of the date of the initiation and asking them to be at the Lodge an hour before the meeting convenes.

Explain that the initiation is entirely serious and that the candidates should dress fashionably. State the initiation fee and that if only partial payment has been made, the balance must be paid before initiation. Mention the annual dates of dues payment and that since dues must always be paid in advance, that the proportionate amount of the half-year's dues must also be paid before initiation.

Tour the Facility: Adjourn the meeting with an invitation to tour the building. In the Lodge room, explain the stations and names and titles of the Officers who occupy them. In club, dining, game and other rooms, explain the rules for their use.

Pay close attention to time throughout the evening. Your chances of connecting with the candidates will be much better if you keep the program short and lively. We are not cramming for a final exam. We want to show them a good time, give them a good overview of the principles and objectives of the Order, and open avenues to greater involvement in the Lodge. The entire evening, from the dinner's first course to the end of the tour, should take no longer than two hours and 30 minutes.

Keep the program short and lively. We are not cramming for a final exam.

It may be helpful to prepare packets of information for the candidates to take home. Include background information about the Lodge and the Elks. You can obtain a copy of "What It Means to Be an Elk" from Grand Lodge, and the "About the Order" section of the official home page of the BPO Elks, http://www.elks.org/about, is an excellent source of handouts. (The home page, by the way, is a great place to send candidates with Internet access who wish to learn more about our organization.) The candidates are more likely to retain information that they can read at their leisure than if you overwhelm them during the Orientation Program, and you're also giving them material that they can easily share with their friends.

Finally, each of the Orientation Program's three functions is compatible with the Stray Elk Program, so consider inviting a select group of Stray Elks to enjoy the evening as guests of the Lodge.

B. Initiation Night

Have the candidates report to the Secretary's office about one hour before the meeting convenes so that there will be enough time to complete the "book work" on each candidate, collect the balance of the initiation fee and dues for the current period and ensure that the Lodge has the candidate's preferred mailing address on file.

The Orientation Chairperson should welcome the candidates and keep them together until the Lodge is ready to receive them for initiation. Discourage the candidates from drinking. In no case should the Lodge initiate a candidate who is intoxicated.

While waiting for initiation, the Chairperson should briefly explain once more the purposes and principles of the Order, review the qualifications for membership, and explain how applications are processed (Interview, procedure of ballot, etc.). In addition, he or she should preview the initiation so that the candidates will know what to expect and therefore get the most out of the ritual; tell them how to respond to the questions they will be asked and that they should do so firmly and clearly. Reassure them that the ritual is entirely serious.

After the initiation, under Good of the Order, each New Member should be introduced by name, residence and occupation, and the Exalted Ruler should welcome the new Elks into the Lodge.

A well-prepared speaker, selected in advance by the Orientation Chairperson, should then talk briefly about an Elks program. Feature a different program at each initiation. The idea is to reinforce what the new Elks learned at Orientation as well as to remind all the Members present of the good works we do.

Following the talk, present each New Member with a copy of the Constitution and Laws of the Order, the By-Laws of the Subordinate Lodge, and the booklet *"What It Means to Be an Elk."*

> The end of the initiation ceremony is just the beginning for these New Members.

C. Post initiation

The end of the initiation ceremony is just the beginning for these New Members. The succeeding 10 to 12 weeks will be the key to retaining them. During this period, they will be evaluating the Lodge.

CAMARADERIE. Are they welcome there? Have they met new people and made friends? Are they having fun?

PARTICIPATION. Have they been invited to help in Lodge charitable and philanthropic programs? Does the Lodge have social activities for both younger and older members? Does it have family activities?

PRIDE. Is the Lodge synonymous in the community with a major project? Are any of the Lodge's charitable and philanthropic works recognized by the community? Is the community even aware that it has an Elks Lodge?

If the answer to any of these questions is "NO," you might lose some or all of your new members.

The solution to the question of pride is obvious: Start blowing your horn.

Use the Lodge bulletin to inform your members about your charitable programs and to invite their participation. *(Regarding the latter, always be positive, focus on the good work that you do and occasionally profile one of your volunteers. Volunteer workers, like flies, are more apt to respond to honey than vinegar).*

Send news releases to your local newspapers. The GL Public Relations Committee produces several excellent tools that can help you get your publicity program off the ground. These include the Media Relations Handbook, Code 5107-1, available from the GL Shipping Department, and Seven Steps to Planning and Staging a Special Event and the ABCs of Publicity, both free and available from the GL Public Relations Department.

Send news releases to The Elks Magazine. We have heard countless myths about the difficulty of getting material published in The Elks Magazine. The fact is the magazine will publish all Lodge news that meets their guidelines (available online at http://www.elks.org/elksmag/fratguid.htm or from the editorial department on request) and that is submitted in a timely manner (within four weeks of the event), no matter whether your Lodge has 100 members or 1,000, you raised $100 or $10,000, or you took one veteran to dinner or 40 to a ball game.

The solution to the questions of camaraderie and participation are a bit trickier. It may not be enough to offer a full slate of social activities appealing to all ages and to be active in the community. Inviting and encouraging new members to participate may not be enough either.

> Most of us do not like walking into unfamiliar territory without a guide. For the New Member, that guide has to be his or her Proposer.

The proposer must be responsible for nurturing the new member until he or she has been integrated into the Lodge. The proposer should offer to take the new member to a Lodge meeting. The proposer should go with the new member to social functions. The proposer should volunteer with the new member to help at a charitable function. Proposers must stay at the sides of new members until they feel comfortable participating on their own, whether that takes three months or six months or a year.

> Ask them to hold their New Member's hand from Orientation through integration.

Consider making the Proposer-Member relationship a formal arrangement in your Lodge. Let your members know how much you appreciate their recruitment efforts, but tell them that just proposing people for membership is not enough. Ask them to hold their New Member's hand from Orientation through integration. You may even want to specify a period during which this arrangement is mandatory. If you do, make it no less than three months and encourage proposers to continue holding their members' hands if integration has not occurred within that period.

Consider offering retention incentives. If you give an award to the person who sponsors the most new members during the Lodge year, why not offer a second award to the proposer from the previous year who has the most members still in good standing.

Another possible solution is the "Red Badge Program." The idea here is to give each New

If we communicate our good works through the Lodge bulletin; if we toot our horns in the local newspapers, our bulletins and The *Elks Magazine*; if we ask proposers to serve as guides from Orientation through integration; and if we ask members to look for the distinguishing mark of new members at all Lodge functions, then the decision whether to remain an Elk after those first 10 to 12 weeks will be a slam dunk.

Summary

Different Lodges demand different Orientation Programs and each should be tailored to fit a Lodge's distinct characteristics. However, the principles are the same: camaraderie, participation and pride. Keep these principles in your sites at all times, because if you can connect with the candidates, you will never see their names on your Lapsation lists

XIV. TEN THINGS I NEED TO KNOW BEFORE I BECOME EXALTED RULER

What is an Exalted Ruler?

- An Exalted Ruler is **not a CEO**. An Elk lodge is a volunteer democracy. So, we cannot give orders to members or direct employees.
- An Exalted Ruler is not the kind of president who merely chairs meetings. We are responsible for much more than conducting meetings.
- The Exalted Ruler is the president as leader. The Elks have a unique definition of the ER as leader. Authority is spread within the lodge through a system of checks and balances. However, our members always have the final say.
- There are important parts of our job that you will not find in our Constitution, bylaws, or Exalted Ruler's Manual. This article discusses some of those.

1. We need to understand the limits of our authority

- We cannot
  - Control the bar and kitchen, set prices for drinks or catering or take charge of rentals.
    - The House Committee has that responsibility
  - Hire & fire staff.
    - The House committee hires for the bar and house. The Secretary hires the office staff.
  - Control the physical plant and equipment or repairs.
    - The Trustees, subject to approval of membership, has that responsibility.
  - Create or approve the budget.
    - The Trustees, House Committee and Secretary create the annual budget and the members approve it.
  - Control finances or pay the bills.
    - The Secretary and Treasurer have that responsibility.
  - Get to spend money:
    - The members ultimately decide how to spend funds.
- So what is left? We have three major areas of authority:
  - Committees & assignments
  - Lodge schedule
  - Conduct lodge meetings
- However, we have much more power than authority.

2. Get to know the General Lodge Statutes & Lodge Bylaws

- The Exalted Ruler is responsible for assuring that all the GL statutes and the local bylaws followed and Grand Lodge programs are implemented
- So, we need to understand the statutes. Read them carefully. Seek advice. If you have a question of interpretation ask PER's, Lodge Advisor, DDGER—in that order.
- If the advice is inconsistent or you are still unsure, email the members of GL Judiciary Committee for Area 7. Put your questions in writing. He will respond within 24 hours.

3. Use your power to appoint and create committees wisely

- Only the Exalted Ruler can create committees, appoint committee chairs and committee members.
- Committees are your best tool to make things happen. Select committee chairs carefully.
- Meet with each committee chair one-on one now before your term starts.
- Make your expectations clear. Agree on committee goals for the year. Ask for a plan. Then give them consistent support.
- Also create ad hoc committees as needed. If the lodge has a special problem or need, appoint a committee to address it and give it a clear charge and timeline.

4. Use the Lodge calendar strategically

- Only you can approve dates for events, including rentals. Insist all dates are cleared with you.
- Develop a plan for the year. Balance lodge events and rentals.
- Schedule at least one significant event each month that is fun and attractive. Such events make money for the general fund.
- Recruit event chairs ASAP. Explain to them how to stage an event. Create an event chair manual.

5. Take charge of meetings and make them interesting

- Have a plan for each meeting. What business do you need to address? How can you make the meeting interesting? Invite others to describe what's happening, events, committees, etc.

6. Stay on top of Lodge finances

- We are not responsible for monitoring and reporting on the Lodge's financial status. However, it is our job to keep the Lodge afloat.
- Find out monthly, whether the Lodge is in the black or red, whether you are staying within the budget and, if not, why not.

- If the Lodge is losing money, work with officers and members to find ways to increase income and control and reduce costs.

7. Think strategically & creatively

- What are your lodge's priority needs for the year? Get input from PER's and members.
- Chose a limited set of goals for the year. We need to focus our energy and time.
- Then develop a strategic plan & decide how to proceed. Think outside the box.

8. Understand and use your "power" to persuade

- The Elks is a volunteer organization. Members want strong leadership.
- Lead by persuasion, example and recognition.
  - Recognize contributions.
  - Be very careful with criticism. Criticism is toxic.
  - Excellent managers spend 90% of time acknowledging success and 10% criticizing outcomes.
- Avoid the temptation to do it yourself.
  - Our job is to lead, delegate and assist, not to do the work.
  - Help out, but never take over.
  - If the job not being done, assist and, if necessary, gracefully switch chairs, but do not take over.

9. Never take sides

- It is OK to take a position on an issue, if only one way is permissible or we have strong convictions.
- However, never align with a group or faction in the lodge, including an officer clique.
- Our job is to be a consensus builder. Treat all with equal respect. Be friendly to all. Make sure all voices heard. Never make it personal.
- We need to recognize that everyone means well. Do not judge their hearts.

10. Leadership is an inside job

- Behavior follows thought.
- If we are truly caring about our members, compassionate, understanding & nonjudgmental and genuinely grateful, we will succeed despite whatever inevitable mistakes we make.

People often forget what we said to them; but they will remember how they felt when we said it.

NOTES

NOTES