MANUAL FOR THE
SECRETARY
OF AN
ELKS LODGE

NEW ELKS MEMBERS

CALHOUN

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
UNITED STATES OF AMERICA
## INDEX

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Absolute Dimit Form</td>
<td>29</td>
</tr>
<tr>
<td>Appendix — Exhibit J</td>
<td></td>
</tr>
<tr>
<td>Annual Report – Page One</td>
<td>8</td>
</tr>
<tr>
<td>Application for Affiliation</td>
<td>25</td>
</tr>
<tr>
<td>Appendix — Exhibit F</td>
<td></td>
</tr>
<tr>
<td>Application for Membership</td>
<td>21</td>
</tr>
<tr>
<td>Appendix — Exhibit D</td>
<td></td>
</tr>
<tr>
<td>Application for Reinstatement</td>
<td>23</td>
</tr>
<tr>
<td>Appendix — Exhibit E</td>
<td></td>
</tr>
<tr>
<td>Bookkeeping</td>
<td>5</td>
</tr>
<tr>
<td>Bonding</td>
<td>3</td>
</tr>
<tr>
<td>Building, Leasing or Selling Lodge Property</td>
<td>14</td>
</tr>
<tr>
<td>Bulletin</td>
<td>14</td>
</tr>
<tr>
<td>By-Law Revisions</td>
<td>13</td>
</tr>
<tr>
<td>Cash Book of Secretary/Treasurer</td>
<td>5</td>
</tr>
<tr>
<td>Appendix — Exhibit K</td>
<td>30</td>
</tr>
<tr>
<td>Certificate of Release</td>
<td>10</td>
</tr>
<tr>
<td>Appendix — Exhibit I</td>
<td>28</td>
</tr>
<tr>
<td>Certificate of Status</td>
<td>11</td>
</tr>
<tr>
<td>Charitable Statistics, reporting of</td>
<td>9</td>
</tr>
<tr>
<td>Chicago Lodge Membership System</td>
<td>3</td>
</tr>
<tr>
<td>Correspondence – General</td>
<td>7</td>
</tr>
<tr>
<td>Dims</td>
<td>10</td>
</tr>
<tr>
<td>Directory Information Form</td>
<td>8</td>
</tr>
<tr>
<td>District Deputy’s Role</td>
<td>15</td>
</tr>
<tr>
<td>District Deputy Visit</td>
<td>5</td>
</tr>
<tr>
<td>Appendix — Exhibit B</td>
<td>19</td>
</tr>
<tr>
<td>Drug Awareness Program Supplies</td>
<td>6</td>
</tr>
<tr>
<td>Dues Billing Statement</td>
<td>32</td>
</tr>
<tr>
<td>Appendix — Exhibit M</td>
<td></td>
</tr>
<tr>
<td>Dues and Lapsation</td>
<td>11</td>
</tr>
<tr>
<td>Elks National Foundation</td>
<td>6</td>
</tr>
<tr>
<td>Financial Records</td>
<td>5</td>
</tr>
<tr>
<td>Federal/State Taxes</td>
<td>6</td>
</tr>
<tr>
<td>Foreword</td>
<td>1</td>
</tr>
<tr>
<td>Grand Lodge Areas</td>
<td>1</td>
</tr>
<tr>
<td>Grand Lodge/GER Awards</td>
<td>7</td>
</tr>
<tr>
<td>Grand Lodge Correspondence</td>
<td>7</td>
</tr>
<tr>
<td>Grand Lodge Publications</td>
<td>4</td>
</tr>
<tr>
<td>Identification Cards – Spouse/Family</td>
<td>11</td>
</tr>
<tr>
<td>Incorporation of Lodge</td>
<td>14</td>
</tr>
<tr>
<td>Insurance Programs, Mandatory</td>
<td>16</td>
</tr>
<tr>
<td>Labels</td>
<td>13</td>
</tr>
<tr>
<td>Laws of Our Order</td>
<td>13</td>
</tr>
<tr>
<td>Life and Honorary Life Members</td>
<td>12</td>
</tr>
<tr>
<td>Lodge Transactions Report</td>
<td>15</td>
</tr>
<tr>
<td>Appendix — Exhibit N</td>
<td>33</td>
</tr>
<tr>
<td>Manuals and Publications</td>
<td>4</td>
</tr>
<tr>
<td>Member Recruiting Awards</td>
<td>7</td>
</tr>
<tr>
<td>Membership Cards</td>
<td>11</td>
</tr>
<tr>
<td>Membership Records</td>
<td>9</td>
</tr>
<tr>
<td>Appendix — Exhibit C</td>
<td>20</td>
</tr>
<tr>
<td>Membership Report</td>
<td>9</td>
</tr>
<tr>
<td>Membership Inquiries</td>
<td>7</td>
</tr>
<tr>
<td>Minutes</td>
<td>6</td>
</tr>
<tr>
<td>National Offices</td>
<td>3</td>
</tr>
<tr>
<td>Notice of Election Form</td>
<td>31</td>
</tr>
<tr>
<td>Appendix — Exhibit L</td>
<td></td>
</tr>
<tr>
<td>Obituary Notices</td>
<td>8</td>
</tr>
<tr>
<td>Office and Files</td>
<td>3</td>
</tr>
<tr>
<td>Orientation</td>
<td>10</td>
</tr>
<tr>
<td>Processing Candidates and Applications</td>
<td>10</td>
</tr>
<tr>
<td>Proper Forms of Address</td>
<td>34</td>
</tr>
<tr>
<td>Proposer’s Duties</td>
<td>9</td>
</tr>
<tr>
<td>Reinstatements and Transfers</td>
<td>10</td>
</tr>
<tr>
<td>Request for Transfer/Certificate of Release</td>
<td>26</td>
</tr>
<tr>
<td>Appendix — Exhibit G</td>
<td></td>
</tr>
<tr>
<td>Secretary’s Duties</td>
<td>2</td>
</tr>
<tr>
<td>Appendix — Exhibit A</td>
<td>18</td>
</tr>
<tr>
<td>State and Federal Taxes</td>
<td>6</td>
</tr>
<tr>
<td>Stray Elks</td>
<td>13</td>
</tr>
<tr>
<td>Supplies</td>
<td>4</td>
</tr>
<tr>
<td>Transfer Dimit</td>
<td>27</td>
</tr>
<tr>
<td>Appendix — Exhibit H</td>
<td></td>
</tr>
<tr>
<td>Types of Minute Books</td>
<td>6</td>
</tr>
<tr>
<td>Voucher System</td>
<td>5</td>
</tr>
<tr>
<td>Web site for Secretaries</td>
<td>4</td>
</tr>
</tbody>
</table>

For the CLMS2Web Help System, log onto [http://www.elks.org/clms2web](http://www.elks.org/clms2web)
GRAND LODGE
Benevolent and Protective
ORDER OF ELKS
UNITED STATES OF AMERICA

FOREWORD

To administer the affairs affecting the welfare of our Order, the country is divided into approximately 250 districts where the Grand Exalted Ruler, the National President of the Order, is represented by an officially appointed District Deputy Grand Exalted Ruler. The District Deputy is the liaison between the Lodges of the district and the Grand Lodge. His or her responsibility is not only to protect the interests of Grand Lodge but to advise the Lodges of the District. If problems arise, the Exalted Ruler and Lodge Secretary must first consult the District Deputy. Further assistance may come from the Past Grand Exalted Ruler(s) assigned to supervise Grand Lodge matters in the area. If the District Deputy cannot supply needed information, together with the Secretary, they may seek the more experienced advice of the Past Grand Exalted Ruler(s).

However, our Lodges are not expected to carry on their duties unassisted. Every significant program of the Order is administered by a parallel Grand Lodge Committee, each consisting of eight dedicated and helpful Committee Members who work with the Lodges, Districts and States in their assigned Grand Lodge Areas. Find your Grand Lodge Area in the listing below and consult frequently the appropriate Committee Members found in the annually distributed Grand Lodge and State Associations Directory to ensure success in your Lodge efforts.

The Secretary is one of the most important Officers of the Local Lodge. This administrative officer must work harmoniously with the Exalted Ruler, the executive head of the Lodge. The success of the Lodge demands this.

A Secretary must be a dedicated Elk deeply interested in our Order and the Lodge, be experienced with office work and have computer skills. He or she is detail-oriented and especially familiar with the Laws and procedures of our Order. New Secretaries should study this Manual, the Manual for Exalted Rulers, Officers and Committee Members, the Statutes Annotated and the Auditing & Accounting Manual. They should read the annual Grand Lodge Proceedings and the Annual Reports made by the Grand Lodge Officers, Commissions and Committees, and all issues of The Elks Magazine. In addition, Lodge Secretaries should become acclimated with the Chicago Lodge Membership System/Secretary Web site at http://www.Elks.Org/clms2web. They must have time to do the job of Secretary. The duties are constant throughout the Lodge year and require prompt and almost daily attention. A good Secretary cannot procrastinate.

Because certain publications are essential to every Secretary’s duties, as soon as they are updated each year, every Lodge will be sent at no charge the Local Lodge Directory [Code 553700], the Grand Lodge & State Associations Directory [Code 553800], the Statutes Annotated [Code 520100], and the Grand Lodge (annual convention) Proceedings [Code 511400]. While you must retain control of these Lodge-owned items for reference, let your Officers and Members know that they can order additional personal copies through you to facilitate their own knowledge and duties. Also, if any manual written specifically for the Lodge Committees undergoes a major revision, a free copy is automatically sent so that your Lodge Committee will benefit from the Order’s latest procedures and suggestions.

We realize that no one publication can answer all the questions or solve all the problems that confront a Secretary. Revisions will necessarily be made in the Manual from time to time, and you can help if you send to the Grand Secretary any comments or suggestions you may have for improving future editions.

Signed,
GRAND SECRETARY

GRAND LODGE AREAS (as of May 2008)

Area 1: Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, Vermont
Area 2: Delaware, District of Columbia, Maryland, New Jersey, Pennsylvania
Area 3: Alabama, Florida, Georgia, Mississippi, North Carolina, Panama, Puerto Rico, South Carolina, Tennessee, Virginia
Area 4: Indiana, Kentucky, Michigan, Ohio, West Virginia
Area 5: Illinois, Iowa, Minnesota, Missouri, Wisconsin
Area 6: Arkansas, Colorado, Kansas, Louisiana, Nebraska, New Mexico, Oklahoma, Texas
Area 7: Arizona, California, Guam, Hawaii, Nevada, Philippines, Utah
Area 8: Alaska, Idaho, Montana, North Dakota, Oregon, South Dakota, Washington, Wyoming

MOST IMPORTANT
Notify the Grand Secretary immediately when any change is made in the office of Exalted Ruler or Lodge Secretary.
**YEAR-ROUND DUTIES**

Keep correct minutes of all sessions.
Keep correct accounts between the Lodge and its Members.
Assign to each New Member a number and create a record file.
Maintain bulletin board notices and posters.
Keep membership records, including mailing addresses, correct in CLMS2Web.
Receive all monies due the Lodge, from any source whatever, paying same to the Treasurer at the earliest practicable moment and obtaining receipt.
Receive all dues from Members, paying same to the Treasurer at the earliest practicable moment, and issue Membership Cards and, if Lodge desires, identification cards.
Assist Lodge Auditor and Committee in preparation of Annual Lodge Audit Report to Grand Lodge, as well as two Membership Reports for Lodge.
Arrange for ordering and receiving of supplies from Grand Secretary in cooperation with Lodge Trustees.
Attend to all correspondence subject to the approval of the Exalted Ruler.
Promptly handle document/record transfers with other Lodges for transferred/reinstated Members.
Apply for contests and awards available to deserving Members.
Notify appropriate Lodge personnel of required license renewals, government reports and property inspections.
Supervise entry year-round of charitable/community service statistics into Charity Records Workbook or, as now required, directly into CLMS2Web upon completion by Committees involved.
Inform persons elected to membership of that fact, and notify rejected applicants.
Attend District and State Association meetings.
Notify the Members of all Committees of their appointments, together with the subject given into their charge, and provide them with appropriate manuals.
Supply Lapsation Committee with monthly Delinquent List.
Report to the Grand Secretary each expulsion or suspension (do not include those dropped from the rolls for nonpayment of dues, or House Committee suspensions).
Report immediately to the Grand Secretary’s office any changes in Exalted Ruler’s and/or Secretary’s names, addresses, phone numbers or email addresses.
Serve as a Member of the Standing Relief Committee.
Perform all duties required in connection with Local Lodge Forums.
Any additional duties approved by the Lodge.

**CHRONOLOGY OF DUTIES**

April:
Prepare Annual Report and send it to Grand Secretary along with Grand Lodge dues as soon as possible after April 1.  
(Sec. 12.050, Stats.) MAY 1 DEADLINE

Report on year’s activities to the Lodge.  
(Sec. 12.050, Stats.)

May:
*Continue Year-Round Duties.

June:
Forward Annual Audit Report to Grand Lodge by JUNE 30.  
Prepare Forum Box with the aid of Trustees.  
(Sec. 1.210, Stats.)  
*Continue Year-Round Duties.

July:
*Continue Year-Round Duties.

August:
Attend District Deputy Clinic.  
*Continue Year-Round Duties.

September:
Prepare Periodic Membership Report.  (Sec. 12.050, Stats.)  
*Continue Year-Round Duties.

October:
Report on half year’s activities of your office to the Lodge.  
(Sec. 12.050, Stats.)  
*Continue Year-Round Duties.

November:
Prepare Periodic Membership Report.  (Sec. 12.050, Stats.)  
*Continue Year-Round Duties.

December:
Prepare Forum Box with the aid of Trustees.  
(Sec. 1.210, Stats.)  
*Continue Year-Round Duties.

January:
Remind Auditing Committee to arrange for Annual Audit.  
*Continue Year-Round Duties.

February:
Prepare Directory Information Forms Packet supplied by Grand Secretary.  
Provide ballots for election (if needed).  
*Continue Year-Round Duties.

March:
Begin preparing for cut-off of fiscal year in all accounts and records at month’s end.  
*Continue Year-Round Duties.
NATIONAL OFFICES — CHICAGO

For when you need to contact us, following are the various Grand Lodge Offices in Chicago: All mail:— (name of person/agency), BPO Elks, 2750 N. Lakeview Avenue, Chicago, IL 60614-1889.

<table>
<thead>
<tr>
<th>OFFICE/AGENCY</th>
<th>PHONE</th>
<th>FAX</th>
<th>E-MAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grand Secretary</td>
<td>773-755-4708</td>
<td>773-755-4790</td>
<td><a href="mailto:grandlodge@elks.org">grandlodge@elks.org</a></td>
</tr>
<tr>
<td>Supplies/Shipping</td>
<td>773-755-4710</td>
<td>773-755-4711</td>
<td><a href="mailto:shipping@elks.org">shipping@elks.org</a></td>
</tr>
<tr>
<td>Central Accounting</td>
<td>773-755-4712</td>
<td>773-755-4713</td>
<td><a href="mailto:acctg@elks.org">acctg@elks.org</a></td>
</tr>
<tr>
<td>Insurance</td>
<td>773-755-4714</td>
<td>773-755-4715</td>
<td><a href="mailto:insurance@elks.org">insurance@elks.org</a></td>
</tr>
<tr>
<td>Veterans Service</td>
<td>773-755-4736</td>
<td>773-755-4737</td>
<td><a href="mailto:vets@elks.org">vets@elks.org</a></td>
</tr>
<tr>
<td>Internet</td>
<td>773-755-4724</td>
<td>773-755-4725</td>
<td><a href="mailto:webmaster@elks.org">webmaster@elks.org</a></td>
</tr>
<tr>
<td>Convention/Meetings</td>
<td>773-755-4722</td>
<td>773-755-4723</td>
<td><a href="mailto:conv@elks.org">conv@elks.org</a></td>
</tr>
<tr>
<td>Foundation/Pledges</td>
<td>773-755-4730</td>
<td>773-755-4733</td>
<td><a href="mailto:pledgeds@elks.org">pledgeds@elks.org</a></td>
</tr>
<tr>
<td>Foundation/Scholarships</td>
<td>773-755-4732</td>
<td>773-755-4733</td>
<td><a href="mailto:scholarship@elks.org">scholarship@elks.org</a></td>
</tr>
<tr>
<td>Magazine/Articles</td>
<td>773-755-4740</td>
<td>773-755-4792</td>
<td><a href="mailto:magnews@elks.org">magnews@elks.org</a></td>
</tr>
<tr>
<td>Magazine/Circulation</td>
<td>773-755-4742</td>
<td>773-755-4743</td>
<td><a href="mailto:magcirc@elks.org">magcirc@elks.org</a></td>
</tr>
<tr>
<td>Label Orders</td>
<td>773-755-4744</td>
<td>773-755-4745</td>
<td><a href="mailto:magcirc@elks.org">magcirc@elks.org</a></td>
</tr>
</tbody>
</table>

* * * AUTOMATED DIRECTORY SERVICE — 773-755-4704 * * *

MEMORIAL BUILDING HOURS/TOURS INFORMATION — 773-755-4876

OFFICE AND FILES

While the Laws of our Order do not explicitly require every Lodge to designate an office for the Lodge Secretary, they do so implicitly by mandating that he or she maintain secure custody of funds and records. Within limits of space and Lodge funds, this office can be as simple or extensive as needed. But several points must be accepted if the Lodge provides such an office. Security is essential for either the entire office or cabinets, computer, safe and desk, which should be locked with only the Secretary having the key. A Secretary could not reasonably assume an obligation and be bonded (see following NOTE), as our Statutes require, to maintain correct records and accounts, if those records could be easily altered, destroyed or removed without the Secretary’s knowledge or consent. Likewise, entrusting records to the Secretary obligates the Lodge to provide sufficient storage to hold them yet allow easy access and reference. Compelling any Secretary to maintain Lodge records off Lodge premises when the Lodge is able to do otherwise is negligence that could ultimately be detrimental to the Lodge.

Our Statutes contain provisions for such clerical assistance as the Secretary’s duties may require. But the final responsibility for maintaining accurate, complete and up-to-date records and accounts can never be delegated away from the Secretary. Because our Statutes stipulate that Lodge records shall be open to inspection by all Lodge Members, regular office hours should be maintained.

While the Statutes do not require that the Lodge maintain a Post Office Box, experience has shown that this practice provides continuity of mail delivery to responsible individuals within the Lodge despite the absence or change in Officers. If the Lodge is not staffed by responsible personnel during daytime hours Monday through Friday to accept deliveries, the Secretary should arrange for an alternate location to handle this duty, after discussion with the Exalted Ruler and Trustees. This shipping address should then be given on all orders for supplies from the Grand Secretary or elsewhere to prevent lost merchandise. A good practice to prevent order duplication or unauthorized purchases is to impress the Lodge seal on all outgoing orders. As custodian of this seal, the Secretary then can coordinate supplies.

NOTE: The coverage provided to all Lodges in the Grand Lodge Insurance Program includes automatic bonding of both the Lodge Secretary and Lodge Treasurer annually for $50,000. Be sure your Lodge isn’t paying for additional duplicate coverage.

CHICAGO LODGE MEMBERSHIP SYSTEM

The Chicago Lodge Membership System (CLMS) is the official membership record keeping and reporting system for the Elks. The computerized system is mandatory for all Lodges. The program is available through the Grand Lodge Web site at: [http://www.Elks.Org/clms2web](http://www.Elks.Org/clms2web).

The duty of the Secretary is to maintain Lodge membership tracking and reporting records by using CLMS2Web.

Computer and Internet requirements can be found in CLMS2Web. The CLMS2Web operating manual is available for printing from the CLMS2Web home page.

In addition to membership recording and tracking, CLMS2Web offers dues billing statements, labels, and envelope options.

SUPPLIES ORDERED FROM GRAND SECRETARY

Discussed elsewhere in this manual are items NOT available from the Shipping Department of the Grand Secretary (ENF forms and materials, Drug Awareness literature, membership card stickers, Lodge mailing labels,
This section deals with those items the Grand Secretary DOES supply, most of which are forms and paraphernalia required by our Laws to be used in all Lodges.

All printed items supplied by the Grand Secretary carry a six-digit reorder Code Number for identifying those items. We also supply up-to-date price lists. (Manuals listed show dates of latest revisions). Order forms are available free upon request. However, the Grand Secretary can only accept merchandise orders from those authorized by the Lodge (Exalted Ruler, Secretary, Trustee or other Lodge-designated person). Page 3 lists the information needed to place orders by mail, e-mail, phone, fax or online.

Orders for in-stock items are normally shipped within two-three days. Back-orders will ship as soon as the material is available. Some items require customized printing, embroidering or engraving, and will take three-12 weeks or longer to ship, depending on the item. Please consult the price list or call for details on custom orders.

When ordering supplies from the Elks National Headquarters in Chicago, specify whether to ship via the Post Office, UPS or FED EX Ground. If no preference is given, your order will be shipped UPS or FED EX Ground, as both services provide tracking numbers and insurance. “Next Day Air” and “Second Day Air” service is available upon request and for an extra charge.

An invoice for each order will be sent separately via first class mail, approximately three days after the merchandise is shipped. Invoices are always sent to the mailing address of the Lodge in care of the Lodge Secretary unless otherwise requested.

UPS and FED EX Ground require a street address for shipment, preferably with someone at that address able to receive and sign for the package. However, if the location is safe from loss and the elements, e.g., an enclosed porch or hall, the driver may leave the package unsigned for. When placing your order for delivery to a street address, specify if this address is residential or commercial (Lodge/business).

SECRETARY’S RESOURCE AT ELKS.ORG

The Grand Lodge Web site features a comprehensive resource center for Local Lodge Secretaries: http://www.Elsks.Org/clms2web. Secretaries can also order Lodge supplies and membership cards, and electronically submit the Grand Lodge-mandated annual and semi-annual membership reports. Secretaries also have access to a private, secretaries-only message board where they can discuss the trials and tribulations of the office and get quick answers to administrative questions.

The website also allows Secretaries to maintain their Lodge “Virtual Home Page,” or VHP. This easy-to-use “Web site construction kit” allows Lodges to post important news, dates, pictures and more without any special technical expertise or software. Those Secretaries who choose not to maintain their VHP personally can electronically appoint a “Cyber-Assistant” to maintain the site.

To access the Web site, simply sign on at http://www.Elks.Org/clms2web with your regular Elks.org user name and password. (If the system doesn’t recognize you as Secretary, contact the Grand Secretary at grandlodge@elks.org to make sure you’re listed as Secretary in the Grand Lodge database.)

If you don’t yet have an Elks.Org password, you can register online at: http://www.Elks.Org/members/registration.cfm

The Secretary’s Web site at Elks.Org is your resource. Please join us online and see how hundreds of other Secretaries are using the Internet to improve the way they do business.

GRAND LODGE PUBLICATIONS THAT SHOULD BE IN SECRETARY’S OFFICE

* Accident Prevention Manual — Code 513100
* Americanism Manual — Code 512000
* Annotated Statutes (latest issue) — Code 520100
* Auditing and Accounting Manual — Code 510100
* Directory of Local Lodges (latest issue) — Code 553700
* Discrimination and Harassment Guide — Code 510900
* Elks National Veterans Service Manual — Code 513500
* ERs, Lodge Officers and Committee Members Manual — Code 510500
* Government Relations Manual — Code 511000
* Grand Lodge Newsletter Issues
* Grand Lodge & State Associations Directory (latest issue) — Code 553800
* Grand Lodge Proceedings — Code 511400
* Grand Lodge Program Book (latest issue) — Code 514000
* Guide to the Courts of the Order — Code 520300
* Judiciary-approved Lodge By-Laws (latest issue) — Code 520501
* History of the Order — Code 511300
* Investigation/Interview Manual — Code 510200
* Leadership Training Booklets (set of 5) — Code 511900
* Liability Insurance Program Guide — Code 513000
* Lodge Activities Manual — Code 510300
is the basic mechanism for financial
are books of original entry. The
You and your Lodge will only have
must be used to facilitate
the Grand Secretary does supply certain basic records, such
their accountant, items such as journal and ledger books. But
same basic formats and accepted accounting procedures.
transactions so that all Lodges will follow essentially the
contains forms and systems to record and plan your financial
Accounting Manual [Code 510100] to guide Local Lodges
The Grand Lodge has published an Auditing and
BOOKKEEPING
is available year-round with valuable insights gained from
deficiencies. And, as stated elsewhere, your District Deputy
areas need adjustment, the purpose of this yearly visit by the
District Deputy is to assist you and the Lodge, not to chastise.
Lodges that request guidance. This Account Numbering
system and practices and make recommendations to
Audit and to help Business Practices advisers analyze the
system permits the Grand Lodge Auditing and Accounting Committee
to evaluate quickly and accurately each Lodge’s Annual
To set up a bookkeeping system to guide the Secretary and
some instances, hiring a public accountant may be advisable
professional bookkeepers. The forms may not be sufficient for
large operation but in the average Lodge, with the addition of a
general journal and a general ledger, these records should be sufficient for keeping the financial records. In
instances, hiring a public accountant may be advisable to set up a bookkeeping system to guide the Secretary and
Treasurer.
While most Lodge transactions follow the same procedures as those of small businesses, many aspects are peculiar to our fraternal structure. In response, most State Associations maintain a Business Practices Committee that is available for guidance, either by telephone or on-site. The Grand Lodge Auditing & Accounting Committee, to which your Lodge sends its annual audit, is available for advice year-round. (See listing on P. 11 – Grand Lodge and State Associations Directory, Code 553800). You and your Lodge will only have yourself to blame for an inadequate record system when so much help is just a telephone call away.
In all Lodge records mandated by our Statutes, the Uniform Chart of Accounts numbering system (as shown in the Auditing & Accounting Manual) must be used to facilitate the Lodge’s periodic financial review. The system permits the Grand Lodge Auditing and Accounting Committee to evaluate quickly and accurately each Lodge’s Annual Audit and to help Business Practices advisers analyze the conditions and practices and make recommendations to Lodges that request guidance. This Account Numbering should be used year-round, along with the manual supplied to the accountant hired to prepare the Annual Audit.

* Media Relations Handbook — Code 510700
* Membership Manual — Code 510400
  Price List of supplies, publications, paraphernalia, and forms available from the Office of the Grand Secretary.
* Regular Ritual Pocket Book — Code 511500
* Rituals of Special Services — Code 511601
* Ritualistic Contest Manual — Code 519900
Robert’s Rules of Order — Code 511700
* Secretary’s Manual — Code 510800
* Youth Activities Program Manual — Code 512100
* Youth Supervision Guide — Code 512200
* Posted online at http://www.Elks.Org/grandlodge/manuals/default.cfm?
If you do not have a complete reference library of the above, order needed items through the Headquarters’ Shipping Department. Additional publications, paraphernalia, forms and miscellaneous supplies appear in the Master Price List issued by the Chicago Headquarters. Additional order forms should be requested when needed.

ANNUAL DISTRICT DEPUTY VISIT
Each fall, the appointed District Deputies must visit their respective Lodges and report on Lodge adherence to the Laws and procedures of the Order, as well as its promotion of Elkdome’s programs. We won’t list the questions or items the District Deputy will wish to address. He or she will have informed you at the August clinic so that you can prepare. (Appendix—Exhibit C).
If a Lodge Secretary has performed all the required duties covered in this manual, there is no cause for alarm. If any areas need adjustment, the purpose of this yearly visit by the District Deputy is to assist you and the Lodge, not to chastise. After the visit, the Lodge will receive the submitted report and a letter from the Grand Exalted Ruler, indicating any deficiencies. And, as stated elsewhere, your District Deputy is available year-round with valuable insights gained from his or her experience with many Lodges.

BOOKKEEPING
The Grand Lodge has published an Auditing and Accounting Manual [Code 510100] to guide Local Lodges in setting up and maintaining its books. This Manual contains forms and systems to record and plan your financial transactions so that all Lodges will follow essentially the same basic formats and accepted accounting procedures. Each Lodge will have to obtain locally, with the advice of their accountant, items such as journal and ledger books. But the Grand Secretary does supply certain basic records, such as the Secretary’s Cash Book [Code 553000], Treasurer’s Cash Book [Code 553100], Secretary’s Receipt Book [Code 552900] and Treasurer’s Receipt Book [Code 553200].
The voucher system is the basic mechanism for financial disbursements of a Lodge through its designated Officers. It provides a physical reference document for future review. The varying needs within our Lodges would almost mandate a custom-designed form in each situation. As a result, Grand Lodge does not supply such a form beyond a basic “suggested” format in the Auditing and Accounting Manual. If your Lodge does not have a voucher system, you and the Treasurer, Trustees, House Committee and Lodge accountant should design and adopt a form for the fiscal welfare of the Lodge.
The Secretary’s Cash Book and Treasurer’s Cash Book (Appendix—Exhibit K) are books of original entry. The Secretary’s Cash Book is for recording receipts from Members and other sources. Numerous columns are provided for the Secretary to devise his or her own headings. Columns are also provided to record payments to the Treasurer.
In the Treasurer’s Cash Book, the receipts from the Secretary, as well as all expenditures, can be recorded. These simple forms have been devised by Grand Lodge with the realization that many Secretaries are part-time and not professional bookkeepers. The forms may not be sufficient for a large operation but in the average Lodge, with the addition of a general journal and a general ledger, these records should be sufficient for keeping the financial records. In
in some instances, hiring a public accountant may be advisable to set up a bookkeeping system to guide the Secretary and Treasurer.

While most Lodge transactions follow the same procedures as those of small businesses, many aspects are peculiar to our fraternal structure. In response, most State Associations maintain a Business Practices Committee that is available for guidance, either by telephone or on-site. The Grand Lodge Auditing & Accounting Committee, to which your Lodge sends its annual audit, is available for advice year-round. (See listing on P. 11 – Grand Lodge and State Associations Directory, Code 553800). You and your Lodge will only have yourself to blame for an inadequate record system when so much help is just a telephone call away.
In all Lodge records mandated by our Statutes, the Uniform Chart of Accounts numbering system (as shown in the Auditing & Accounting Manual) must be used to facilitate the Lodge’s periodic financial review. The system permits the Grand Lodge Auditing and Accounting Committee to evaluate quickly and accurately each Lodge’s Annual Audit and to help Business Practices advisers analyze the conditions and practices and make recommendations to Lodges that request guidance. This Account Numbering should be used year-round, along with the manual supplied to the accountant hired to prepare the Annual Audit.
ELKS NATIONAL FOUNDATION

The Elks National Foundation helps Elks build stronger communities through programs that support youth, serve veterans, and meet needs in Elks communities. Lodge Secretaries play an important role in helping the ENF fulfill its mission by working with Lodge ENF Fundraising Chairs, and with approval of the Lodge’s Exalted Ruler, delegating ENF Community Investments Program Grant Coordinators and ENF Scholarship Coordinators.

Lodge ENF Fundraising Chairs promote the ENF’s work, solicit donations from Lodge Members to support ENF programs, provide donors with accurate giving information, and communicate regularly with the ENF. Many Lodge Secretaries support the ENF Fundraising Chairs by assisting with submitting donations to the ENF. Your Lodge ENF Fundraising Chair has access to training materials and instructions on how to properly submit donations. You can access ENF donor reports by clicking on the ENF Reports section of CLMS2Web under Reports. You can also submit donations given with dues payments using the Remittance Sheet for ENF Donations Included with CLMS Dues, found in the ENF Reports section of CLMS2Web. To quickly and accurately submit donations given other than with dues payments, you and your Lodge ENF Fundraising Chair can use the ENF Online Remittance Form, also found in the ENF Reports section of CLMS2Web. Instructions for both ways to remit donations are in CLMS2Web. To request ENF supplies, such as donor cards, membership card stickers or brochures, visit www.Elks.Org/enf/SupplyOrders.cfm.

Secretaries can also apply for Community Investment Program Beacon, Gratitude, Promise and Impact Grants. These grants help Lodges serve the community by meeting local needs. Secretaries can access and apply for these grants through CLMS2Web, or with the approval of the Lodge’s Exalted Ruler, appoint a Grant Coordinator in CLMS2Web to take that responsibility. The ENF encourages all Lodges to take advantage of Community Investment Program grants. For details, visit www.Elks.Org/enf/community.

Finally, Secretaries, with the approval of the Lodge’s Exalted Ruler, can appoint Lodge Scholarship Coordinators through CLMS2Web. These individuals are responsible for claiming the Lodge MVS applications on the online MVS Judging Dashboard, and selecting qualifying applications to advance to the next level. Often, the Lodge Scholarship Coordinator is the Scholarship Chair — if not, they work closely together.

For more information on how you can help your Lodge get involved with the ENF, and for the latest ENF news, visit www.elks.org/enf, or contact the ENF by phone at (773) 755-4728, by email at enf@elks.org or by mail at:

ELKS NATIONAL FOUNDATION
2750 N. Lakeview Avenue
Chicago, Illinois 60614-2256

DRUG AWARENESS PROGRAM SUPPLIES

Your Lodge will have a Drug Awareness Program Committee devoted to making the youth of your community healthy, productive and free of substance abuse. On occasion, you may have to help by ordering drug awareness literature for your Lodge. These materials must be ordered through the Chairman of your State Association’s Drug Awareness Program. We ask you to keep the Chairman’s name, address and telephone number handy for your Lodge Committee’s use. For information on the Drug Awareness Program or to find the name of your State DAP Chairman, visit: http://www.elks.org/dap/.

STATE AND FEDERAL TAXES

Our Order and Local Lodges are exempt from federal income tax under Section 501(c)(8) of the Internal Revenue Code. This exemption is also enjoyed by similar organizations. However, since the exemption of a Local Lodge can be revoked for cause, even retroactively, every Lodge should be meticulous to avoid actions that might cause the loss of this privilege. All Secretaries should make sure that Lodge records are well-kept and that all reports that may be required of exempt organizations by the Internal Revenue Service and other government agencies, are filed promptly, accurately and completely. The IRS has stated no objection to fraternal organizations or clubs promoting greater use of their facilities by Members and their bona fide guests, but there is serious objection to soliciting public business.

A pertinent IRS ruling in connection with this matter states:

“A club which engages in business, such as making its social and recreational facilities available to the general public ...is not organized and operated exclusively for pleasure, recreation, and other non-profitable purposes, and is not exempt under section 501(a) of the Internal Revenue Code. Solicitation by advertisement or otherwise for public patronage of its facilities is prima facie evidence that the club is engaging in business and is not being operated exclusively for pleasure, recreation or social purposes.”

Our Order and Lodges, as employers, are liable for (a) withholding income tax from wages of employees; (b) taxes under the Federal Contributions Act (for social security); and (c) the tax under the Federal Unemployment Tax Act (for unemployment insurance). This applies to salaries paid to Lodge Secretaries and other specified Officers.

The Tax Reform Act of 1969 provides that Informational Tax Returns must be filed by all tax-exempt organizations. Failure to file such returns will result in a maximum $5,000 penalty per year and/or loss of tax exempt status. Contact your nearest IRS office in this regard.

Every Lodge Secretary should become familiar with the above tax laws by obtaining from the IRS and other sources all available literature. The Secretary should also be familiar with the income and withholding tax (if any) as well as the unemployment tax provisions in the Lodge’s state.
MINUTES

The Secretary is required to keep minutes of each Lodge meeting. Great care should be taken to see that this record is accurate and complete. Writing your minutes during the Lodge meeting should be avoided. Notes should be made in the meeting and minutes written afterwards. See that any notes you take are comprehensive enough to write minutes intelligently after the meeting. Taping each meeting is permitted, but not for permanent record. The recording should be erased after writing the minutes.

Make certain you record the applications received, applicants elected or rejected, applicants initiated, reinstated or affiliated as well as those Members who are ill or have died since the last meeting. Care should also be taken to see that motions are accurately recorded. Well-kept minutes can prove valuable when the information is needed. Of course, your minutes definitely MUST INCLUDE any action required by Statute or Grand Lodge, should confirmation of compliance be required later.


As Lodge Secretary you not only take minutes of meetings but also read them at the next meeting. A Lodge is only as strong as the interest demonstrated by its Members. Knowledge of the Lodge’s condition is vital to the Members’ continued interest. When reading the previous meeting’s minutes, it is always better to give too much information than to short-change those Members who want to take part and improve the Lodge. These are the same Members who can be depended upon when needed on short notice.

Special attention should be given to “Receipts of the Session” and “Bills Against The Lodge,” with dollar amounts and all pertinent details read for each entry, rather than just “$473.29 received” or “we owe $581.” When motions are for voting at a subsequent meeting, restate the motion for those Members who may have forgotten or who weren’t present previously. Once you have recorded minutes and read them at the next meeting, more than likely you need not be concerned further. However, whenever a question arises on a previous floor action, you will have to locate the appropriate minutes. This means you must create an index, either as a separate cross-reference or simply by attaching a small note to each meeting’s minutes listing major subjects discussed or motions passed. You need not include names of Members initiated, transferred, etc., as their membership sheet will give the pertinent dates from which to locate the minutes of the meeting where action was taken.

The Lodge Secretary must also record the proceedings of any Local Lodge Forum and assist the Exalted Ruler in conducting it in strict compliance with our Laws, which are detailed in Chapter 8 of the current Statutes. Your Lodge may never have to conduct a Local Lodge Forum. But you should become familiar with Chapter 8 now when you have time to study it and ask questions, rather than later when the need arises and time is limited.

CORRESPONDENCE

In most cases, the Lodge correspondence for which you are responsible will be the only contact your Lodge has with others in the Order, including those at Lodge, District, State or Grand Lodge levels. Just as you earnestly perform your duties, so do they, with your assistance required. If you respond promptly and cooperatively to the Elk with whom you are communicating, you will serve your Lodge and the Order satisfactorily.

Conflict in Lodges can result when mail addressed by name to the Exalted Ruler, Secretary or other Officer or manager, is opened by others through error or good intentions. Everyone likes privacy, but this is not an absolute right in the context of a Lodge. Inform all new Officers, Committee Members and employees that the Lodge address is not for private mail, and restate this policy periodically. Some latitude is reasonable, such as holding an unopened letter for a week. But the possibility of a Lodge program failing because of information withheld, should override any further delay in opening the letter.

For corresponding with other Lodges, your primary tool will be the annually revised Local Lodge Directory, which will automatically be sent to you. You ensure that Lodge correspondence will reach you by completing the Directory Information Form, which is discussed immediately after this section. By using the correct address for the Lodge or Secretary to whom you write, you ensure as much as possible that the correspondence will be received. Keep this Directory at all times. It is primarily for the use of Secretaries as well as other officials. Should replacements or additional copies for Members be needed, order Code 553700.

Many Districts publish their own annual directory. Should you need one, contact your District Deputy. If none exists, you may need to compile one with the help of the District Deputy. Almost every State Association publishes its own directory annually following the state convention where its Officers are elected and installed. You should contact the State Association Secretary to obtain one. However, names of every State Association President, Secretary, Editor and major Committee Chairpersons appear in the Grand Lodge and State Associations Directory, which is automatically sent to you after the annual Grand Lodge Session. Additional copies can be ordered from the Grand Secretary [Code 553800]. At the front of this same Directory are names, addresses and telephone numbers of the Grand Exalted Ruler and other current Grand Lodge Officers and Committees. Here also appear the Grand Trustees, Past Grand Exalted Rulers, Grand Lodge Commissions and Agencies. Use it to direct correspondence to the proper persons in Grand Lodge. (See Address Guide, Page 34). On each State’s page in this Directory appear all current District Deputies. Also, the most frequently contacted Grand Lodge Officials are listed in the Grand Lodge Newsletter published after each year’s Grand Lodge Session.
MEMBERSHIP INQUIRIES

The Grand Lodge Web has implemented a new membership inquiry system – http://www.Elks.Org/who/ – designed to allow members of the public to contact the Lodge to express their interest in joining the Order. Inquiries submitted in this manner will display automatically in the “Alerts” section at http://www.Elks.Org/clms2web. Please respond to all membership inquiries within seven days of submission.

GRAND LODGE/GER AWARDS & CONTESTS

Also important to outgoing Lodge communications are requests to the Grand Secretary and Grand Lodge Fraternal Committee for various awards for recruiting new or reinstated Members. Notwithstanding any in-Lodge incentives, Grand Lodge wants to ensure that these dedicated Elks Recruiters are suitably recognized. Familiarize yourself with the requirements for these national awards, and forward recipients’ names when your records show they have earned our gratitude and praise.

The outstanding activities of every successful Lodge result from teamwork, and your position gives you responsibility for bringing recognition to Members who have been a credit to your Lodge in your community. Throughout the year, you will receive entry forms for numerous contests that merely require you to recap the Lodge goals that have been accomplished. We ask you to return those completed entry forms for the services that your Officers and Members performed. (These forms do not include those designated for the person or committee to fill out.) In our volunteer system, saying “Thank You” through these contests and awards help keep the volunteers donating their time and energy.

DIRECTORY INFORMATION FORMS PACKET

One item required to be verified or adjusted annually is your Lodge list of ZIP Codes from which you may statutorily recruit Members. Before a Secretary either enters the same ZIP Codes as the previous year or arbitrarily chooses new ones, the Secretary should consult with the Lodge Officers and the District Deputy. If another Lodge has relocated or a new Lodge is instituted nearby, or a neighboring Lodge closes, the list of ZIP Codes assigned to your Lodge will need to be adjusted. Affected Lodge Officers, assisted by the District Deputy, should discuss the fair allocation of territory among the Lodges. This same discussion will also ensure that no schools, veterans facilities or communities are left out of Lodge-administered programs such as ENF Scholarships, Hoop Shoot®, Veterans Service and others. Once determined, this ZIP Code “footprint” for your Lodge can be entered and “reserved” for your Lodge permanently unless further change occurs. Anytime your Lodge jurisdiction changes, you must contact your District Deputy, who will make recommendations to the Sponsor. If your Sponsor concurs, he or she will advise us to make the changes.

The last part of the Secretary’s duties connected with the Grand Secretary involves the Lodge’s Past Exalted Rulers. The PER’s are listed by ascending Lodge Number at the back of each Local Lodge Directory. In the year since a Lodge’s last Directory submission to Grand Lodge, some changes will probably have occurred in that list. Because each person named is also qualified to vote at the annual National Convention, this list is more than a record of Lodges’ living Past Chief Executive Officers. Lodge Secretaries should add the name of the Exalted Ruler who will complete the term for the Local Lodge year just ending, plus any PER who transfers in or reinstates. (Give the year served as ER, regardless of Lodge). Likewise remove the name of any PER dropped, expelled, suspended, dimitted out or deceased. For any deceased PER whose name you remove from the one list, these names should be submitted on a separate sheet, which is the basis for a Past Exalted Rulers Memorial list or Necrology published annually as part of the Grand Lodge Proceedings.

THE ELKS MAGAZINE OBITUARY NOTICE

Every Lodge Secretary is to report to the editor of The Elks Magazine the passing of fellow Lodge Members who had been a Past District Deputy or of a higher position in Grand Lodge so that official notice can be given to everyone in the Order. Whether informing the Magazine of the death by telephone, e-mail or in writing, give the deceased’s full name and dates of birth, death and initiation into the Order, positions held with years of service and Lodge affiliation. This will ensure that the proper honors will be shown to those who have given exemplary service to Elkdom.

MEMBERSHIP REPORT TO GRAND LODGE

The Secretary is required to furnish two statistical reports to Grand Lodge each year. These reports are due April 1 and November 1, and are filed at http://www.Elks.Org/clms2web.

The Secretary is required to maintain the Lodge membership tracking and reporting records in CLMS2Web. It is imperative that the membership records be fully and accurately completed. Please be advised that the starting number of all reports (Line 1) cannot be changed. Proper record-keeping must be maintained.

Sometimes the membership reports indicate that some Secretaries do not properly define delinquents. Dues are payable IN ADVANCE and hence on April 1. If a Member does not have a card indicating his or her dues are paid beyond the day before (March 31), he or she is six-months delinquent; if a Member does not have a card showing his or her dues paid beyond the preceding September 30, that Member is one year delinquent; and if his or her card shows the Member is only paid to March 31 of the previous year or before, he or she is more than one year delinquent. (Our Statutes do not provide any grace period for paying dues after the due date.)

The most critical report that must be made by the Secretary is the Annual Report. The Annual Report is to be completed by the Secretary and electronically transmitted.
via CLMS2Web to the Grand Secretary along with the Grand Lodge dues before May 1. By February 1 each year, the Grand Secretary will send to every Lodge Secretary notice of the full Per Capita Grand Lodge Dues and Assessments required to accompany that year’s April 1 Membership Report.

Instructions for electronic filing the April 1 and November 1 Membership Reports can be found at http://www.Elnks.Org/clms2web. Annual per capita and assessments payments are based on the reporting figures stated on the April 1 membership report and must be sent to Grand Lodge within five days of filing the Annual Report.

Contents of this Annual Report — both the membership figures on Page One AND the Charitable Statistics on Page Two — are so important to the continued operation of the Order that Lodge failure or tardiness in filing the reports carries a $100 fine and possible probation or harsher penalties. The Grand Secretary must have the Annual Report as soon as possible after March 31 to have all the figures printed before the Grand Lodge Session.

Most important is that the Annual Report be accurate, complete and filed promptly so that a true picture of the Lodge membership, financial condition and charitable contributions may be reflected in the Annual Reports of Grand Lodge. Distribution of the November and Annual Membership Reports other than to the Grand Secretary, are not required unless requested by the Sponsoring Past Grand Exalted Ruler.

REPORTING OF CHARITABLE STATISTICS

As mentioned previously, you should supervise the entry of dollars, hours and other vital statistics into the Charity Records Workbook or, as now required, directly at http://www.Elnks.Org/clms2web. While you do not personally conduct all the community service, veterans, youth and patriotic programs of the Lodge, you should ensure that every committee brings their figures to you after giving a final report to the Lodge. As soon after the Fraternal year ends March 31, and before April 30, your total charitable figures are required to be filed directly into CLMS2Web. Also, be advised that the Annual Report forms are no longer mailed to Lodges for filling out and returning to the Grand Secretary. Only the Charity Records Workbook is mailed to Lodges to assist Secretaries in compiling Lodge charitable statistics during the year.

MERGERS

While Lodge mergers are infrequent, they do require much activity by both Secretaries, such as producing up-to-the-minute statistics so Lodge Officers and Members can accurately and quickly evaluate each Lodge’s assets and liabilities. Grand Lodge will supply ample directions in accordance with Sec. 11.060 for properly handling all aspects. But two particular duties of the Secretary for the Lodge existing AFTER the merger bear special mention:

MEMBERSHIP REPORTS: All such mergers will have an Effective Date, either stated in the Grand Exalted Ruler’s Executive Order, which authorizes one Lodge merging into the Lodge that continues after the transaction, or the Institution Date for Lodges, which combine all their assets and memberships to form a completely new Lodge. Extremely important to the surviving Lodge is that the April 1 Membership Report (as well as the November 1 Report when applicable), which is due AFTER the Effective Date, accurately accounts for the Members added to its rolls. While it is relatively simple for Grand Lodge to reduce to zero the numbers previously shown under the closing Lodges without even the need of a report, the surviving Lodge must make sure to add in every merger-acquired Member as AFFILIATING BY DIMIT on Line 3 (must be done here since no “MERGER” Line exists), plus those individual Dimit/Certificate of Release cases coming in from other non-merger Lodges.

INDIVIDUAL MEMBERSHIP NUMBERS—ADDED MEMBERS: When one Lodge merges into an existing Lodge, the Secretary of the surviving Lodge (one which has the same Lodge Number, even if Lodge name may change) MUST ASSIGN NEW MEMBERSHIP NUMBERS TO ONLY THOSE COMING ONTO THE SURVIVING LODGE'S ROLLS FROM THE ABSORBED LODGE IN CONTINUANCE OF THE SAME SEQUENCE AS THE NUMBERS ASSIGNED UP TO THAT POINT. If both Lodges cease to exist in order to create a new Lodge, ALL MEMBERS MUST BE ASSIGNED NEW MEMBERSHIP NUMBERS. Grand Lodge records depend on correct membership roll numbers, so it is critical that the roster maintained at The Elks Magazine Circulation Department be updated with the new numbers for these Members AS SOON AS POSSIBLE. For advice on forwarding this large amount of information to The Elks Magazine, call the Circulation Department at 1-773-755-4742.

MEMBERSHIP RECORDS

Chicago Lodge Membership System 2Web, available at http://www.Elnks.Org/clms2web is the official membership record keeping and reporting system for the Elks. Lodges, through their secretaries, are required to maintain the Lodge membership tracking and reporting system using CLMS2Web. Membership information entered into CLMS2Web must be backed up at the Grand Lodge “offsite” location every time membership information is entered.

Financial records, money and legal documents should be kept in a fireproof safe or vault.

A Secretary should always know how many Members the Lodge has and the dues status of each.

Every Lodge should have a complete record of every Elk who was ever on its roll. Regrettfully, until CLMS was implemented, the Grand Secretary had to inform many Secretaries inquiring about a former Member’s record that NO GRAND LODGE OFFICER OR AGENCY had these records (other than the current membership roster for mailing The Elks Magazine). ONLY the Local Lodges had this information.
Use of the CLMS program will now allow tracking of this information.

PROPOSER’S DUTIES

An Elk may propose or “sponsor” a candidate for membership in the Order, but the Secretary represents the Order’s laws and Lodge’s interests. The Proposer makes the first evaluation of the candidate’s worthiness and explains what membership in the Order involves. That person helps in submitting a completed Membership application and participating with the candidate even after initiation. The Proposer should likewise ensure that the statutory timetable for processing the application is followed, and explain any delays to the candidate, who has no rights or voice within the Order at this stage. Conversely, the Proposer is responsible for explaining to the candidate if the application is incomplete or invalid, if sponsorship is withdrawn at any point before the ballot, or in case of a negative ballot. ONE IMPORTANT POINT: Section 14.020 was changed in 2002 to permit ANY ELK to propose a qualified person for membership in ANY LODGE. But read this Section thoroughly as there are some conditions with which a Secretary must be familiar.

PROCESSING CANDIDATES & APPLICATIONS

REMINDER — The official Membership application is a two-sided 8 1/2 by 11 tri-folded sheet (Appendix—Exhibit D). Use only this current form, which is available through the Grand Secretary. Membership applications may also be filed at http://www.elks.org/grandlodge/resources.cfm?

A properly completed application received by the Secretary, should be placed in a folder marked “New Applications to be Read at the Next Lodge Meeting.”

After the application has been read in the Lodge, it should be turned over to the Investigating Committee. A record of the application should be kept by the Secretary in case the application is misplaced. In some Lodges a form is provided for the report of the Investigating Committee or the report can be made by the Investigating Committee on the application form itself. But in either event, a folder should be used marked “Applications in the Hands of the Investigating Committee.”

After the Investigating Committee has acted, the application should be transferred to a folder marked “Ready for Balloting.” If the ballot is favorable, then the application should be transferred to a folder marked “Ready for Initiation.” A Notice of Election form (Appendix—Exhibit L) is available. Along with notifying candidates of election to membership, you will have to inform them of the dates and times to attend both the orientation (see following section) and initiation. To clarify one important point: LODGES MAY NOW HOLD BALLOTING ON AN INDIVIDUAL AND THEN INITIATE OR REJECT THAT PERSON ON THE SAME NIGHT! per Section 14.030 of the Statutes Annotated.

During initiation and orientation, the new Member should be assigned a permanent sequential membership number and sign the Constitution and By-Laws book. No membership numbers should ever be duplicated. Make sure you have the spelling of the Candidate’s name and correct mailing address. After initiation the Statutes require you to give the candidate the latest Constitution and Statutes of the Order, the Lodge By-Laws and the booklet, “What It Means To Be An Elk.” Your Lodge must maintain a sufficient supply of these three items for the District Deputy to verify during his or her yearly visit.

After the candidate has been initiated, add the name to your CLMS2Web membership database and send a timely backup to the Grand Lodge so the candidate may begin receiving his or her copy of The Elks Magazine.

*If the Candidate is rejected when the ballot is taken, write a letter advising that the application has not been favorably acted upon and return the fees paid. In your letter, do not offer any explanation for the unfavorable ballot or advise that re-application may be made in six months. These actions are outside the authority of the Lodge Secretary. Keep the application or record of it in a dead file.

ORIENTATION INVOLVEMENT

Every candidate for membership is required to be orientated before initiation about the principles, goals and activities of Elkdom. To accomplish this, each Lodge has been supplied a video for viewing by candidates. All Lodges are urged to supplement this with information concerning their own Lodge, District and State activities.

Because of the Lodge Secretary’s required involvement in processing candidates, from submitting the application through initiation, you also will probably be part of the Orientation Committee. However, with the backing of the Exalted Ruler, stress to all Officers that your participation will be limited to technical director (to run the VCR or DVD player for the prerecorded segments). The other Orientation Committee Members, and as many of the Lodge Officers as possible, must participate in and deliver the “live” portions to make the orientation informative and enjoyable for these candidates and their families. Your advance duties include: scheduling the orientation date and place; inviting the candidates AND THEIR SPOUSES AND FAMILIES; notifying the Orientation Committee, Officers AND THE CANDIDATE’S SPONSORS for their attendance; repeatedly inviting current Members to see the presentation; and possibly inviting prominent non-Elks leaders to learn how our Order benefits their community. Set up the equipment ahead of time, handle any arriving candidate’s paperwork, give them name-tags to make getting acquainted easier and put them in the hands of the Officers and their Sponsors for a pre-show Lodge tour, dinner or hors d’oeuvres. Start the actual presentation on time, and then let the Exalted Ruler, Officers and Orientation Committee run the show based on suggestions in the Orientation Manual.

REINSTATMENTS, TRANSFERS & MERGERS

(NOTE: If a former Member’s facts relating to previous membership are unclear, you may receive verification from the list maintained in the Grand Secretary’s office. If the Member had been expelled or suspended, he or she would
have to apply for and receive a pardon or commutation of the suspension before you may process the reinstatement/affiliation.)

A former Elk may be reinstated in the former Lodge by secret ballot after paying the reinstatement fee prescribed by the Lodge By-Laws as well as the pro rated dues. The former Member should fill out the Reinstatement Application (Appendix—Exhibit E) and be processed as the application of a new Member. When reaffiliated, the Member’s old membership number should be restored.

A Member dropped for nonpayment of dues, who now lives within the jurisdiction of another Lodge, may apply for membership in another Lodge by paying a $20 fee and filing the Request for Certificate of Release with the former Lodge (Appendix—Exhibit G). Granting of the Certificate of Release (Appendix—Exhibit I) is mandatory but the issuing Lodge may make recommendations to the affiliating Lodge for reinstating an unaffiliated Member. This Release will allow the person to fill out the affiliation forms per Section 14.180.

Occasionally, an unaffiliated Elk will apply to the former Lodge (or another where now residing) for reinstatement, only to be informed that no record of former membership can be found. Elks Statutes do not provide recourse, but Grand Lodge has stipulated that the Lodge thought to be in possession of the record must exhaust every means of locating or recreating it, and, second, that the burden of proving former membership must rest with the person requesting reinstatement. If the unaffiliated Member can produce some documentation (ideally an old membership card, old dues billing statement or official proceedings of an Elks function that lists or designates the unaffiliated Member as an Elk), the Secretary may process the reinstatement. The Secretary could also accept an affidavit from two Elks in good standing that the individual previously was, to the best of their knowledge, a Member. For reinstating without verification of when the previous Member began active service, the Secretary shall note the records accordingly and explain to the reinstated Member that any question related to length of service must be based on the current reinstatement date. In the absence of proof, of course, the qualified applicant shall be initiated as a new Member.

If a paid-up Member has moved into the jurisdiction of another Lodge and desires to join the other Lodge, he or she must file a written Request for Transfer Dimit (Appendix—Exhibit G) with his current Lodge. Such request should be made promptly (without a floor vote) and the completed Transfer Dimit (Appendix—Exhibit H) mailed to the Lodge Secretary in which the Member has requested affiliation. The Transfer Dimit must be granted if the applicant is a resident of the Lodge with which he or she wants to affiliate, if the applicant’s current dues are paid and he or she is under no other obligation to the Lodge and if no charges are pending against the applicant. The Member’s name should not be removed from the rolls of your Lodge until the other Lodge has notified you of his or her acceptance, effective the date of the affirmative ballot.

An applicant for affiliation by Transfer Dimit into your Lodge should be required to fill out an Affiliation form (Appendix—Exhibit F). The Dimit should then be processed as a new application. If elected, the Member should be assigned a new membership number. The dues of a Member received by the Lodge on Transfer Dimit shall commence with the semi-annual period after which he or she has paid dues to the Lodge that granted the Transfer Dimit [Section 14.110].

When the affiliate has been accepted, the new Lodge Secretary should immediately notify the Lodge from which he or she has transferred. This may be done at http://www.elks.org/clms2web.

Our Statutes permit a Member to resign. A Member in good standing may, in accordance with Section 14.110, apply (in writing) for an Absolute Dimit, (Appendix—Exhibit J) which shall be granted, again without a floor vote. The Member then becomes an unaffiliated Elk and should be removed from the Lodge’s active rolls [Section 14.120].

NOTE: Sometimes in a disagreement, a Member may tear up his card and say he “quits.” But the Secretary must keep the Member on the Lodge rolls unless he or she submits a signed request for an Absolute Dimit or is dropped. Also, after tempers have cooled, the Member must be issued a replacement card should he or she request one as long as dues are still current.

A former Member of a defunct Lodge must apply to the Grand Secretary for a Certificate of Status to permit him or her to apply for affiliation as on a Transfer Dimit or Certificate of Release [Sections 14.230 and 14.250].

DUES AND LAPSATION

While no “cure-all” for lapsation may exist, the Lodge Secretary working with an active Lapsation Committee can do much to save delinquent Members.

The problem should be addressed year-round by the Secretary and Lapsation Committee. The Secretary should bill the Lodge’s delinquents monthly. Since dues are payable in advance, Members should be billed in advance. Many Secretaries bill their entire membership in March by enclosing the billing form and remittance envelope (Appendix—Exhibit M) in their monthly bulletin, indicating that the bill may be disregarded by those who have paid before receiving the bill. A good idea is to start billing for the new year about February 15 and then again on March 15 and the first of each month thereafter to those still not paid. With this system many Lodges begin the new year on April 1 with more than 50 percent of the membership paid up.

The Secretary should also constantly keep on top of delinquents by transferring their membership ledger sheets to another file or by using different colored file signals. In addition, the Secretary should follow the program outlined in the lapsation section of the Membership Manual to keep up the comparative membership and lapsation figures. He
or she should review the figures with the Exalted Ruler and Lapsation Committee the first of every month and report them at the next Lodge meeting. Every Lodge should try to improve on the previous year’s figures.

**MEMBERSHIP CARDS**

An Elk who has paid the required Lodge and Grand Lodge dues and assessments is entitled to receive a Membership Card bearing the Lodge seal and signed by the Secretary and Member. The Lodge seal should be imprinted on every card to protect against forgery.

Only BPOE membership cards supplied by the Grand Secretary may be used by Lodges and Members. Lodge Secretaries MUST HAVE CARDS TO ISSUE BEFORE the next Lodge year begins each April 1. Generally, orders are accepted from September to March. If the Lodge Secretary has not placed a Membership Card Order in the allotted timeframe, the Grand Secretary’s office will issue a minimum supply of basic cards to permit the Lodge to continue operating, with the Lodge required to pay for the “forced” cards. Every September, keep your eye open for the card order form, and act on it promptly. Lodge Secretaries who fail to act should not expect a waiver of the Lodge debt on grounds that the cards they receive do not match their specifications.

Since the color of the card is changed annually on April 1, no cards should be issued to show a payment beyond the life of the card. If a Member pays dues from October to October, the card should be issued only to April 1 and the Member given a receipt for the six months’ dues from April 1 to October 1. The entire amount should be posted and a new six-month card issued to the Member on April 1.

**NOTE:** Lodges are now allowed to amend their By-Laws to require payment of FULL-YEAR DUES ONLY. Secretaries should confer with other Lodge Officers to consider this option to save on bookkeeping time.

Before issuing annual cards to Life and Honorary Life Members, those Members are required by Statute to pay the Grand Lodge per capita dues and assessments, State Associations dues and, when provided by Lodge By-Laws, a Lodge administration expense of not less than $5 nor more than half of the regular Lodge dues. Identification cards for the spouses of Lodge Members or the family of deceased Members should be issued upon request in accordance with Section 14.140 and at no charge.

In many Lodges, the House Committee issues ASSOCIATE MEMBER Cards to Members of other Lodges who use the Lodge’s recreational facilities. For this purpose, these Lodges are advised to have their Secretary annually order extra ID cards. The House Committee can then simply stamp the cards “ASSOCIATE MEMBER” using an inexpensive rubber stamp. Be advised, though, that the Associate Member Program means that the Secretary must also keep a separate file of these individuals, their “home” Lodges and any collected fees. Such “Associates” are NEVER counted along with the Lodge’s actual roll Members on any Grand Lodge-required Membership Reports. If your Lodge applies stickers to cards bearing years of membership, positions held, etc., the Secretary is responsible for maintaining the information needed to furnish the correct sticker with each card. While Lodge “customs” vary regarding the year stickers, the one “rock-solid” common rule is that ONLY ACTIVE (in good standing) YEARS can be counted! Improved dues collection can result from using the “Early Bird” sticker, which denotes those who have paid their Lodge dues in advance of the next dues period. While the Grand Secretary does not supply these stickers, his office can suggest where they may be obtained.

When a membership card is issued, a record of the dues, initiation, affiliation or reinstatement fee (if any) should be entered into the cash book and posted on the Member’s loose-leaf membership sheet in the visible-record book and/or ledger, or recorded into CLMS2Web. Dues collected, as well as any other funds received by the Secretary, should be turned over periodically to the Treasurer and a receipt given the Secretary. Mention must be made of the statutory restriction regarding changes in a Lodge’s dues. These cannot be charged to Members until the April 1 after the date of approval by the Grand Lodge Committee on Judiciary.

Each September, the Grand Secretary will send Lodge Secretaries an order form for the next year’s membership cards. If you have not received this form by October 31, call or email the Grand Secretary’s office and one will be sent to you. Based on shortages or excess cards of the four types of cards — Regular, Life, Honorary Life and Identification (or spouse) cards in the Secretary’s possession — estimate your needs for the coming year, complete the form and return it to the Grand Secretary’s office as soon as possible. While the factors involved in shipping more than 3 million cards to approximately 2,000 Lodges prevent promising a definite ship date for your cards, the sooner they’re ordered, the sooner you receive them. Be sure to retain a Lodge file copy for reference. For questions concerning your Membership Card order, call the Membership Card Hotline at 1-773-755-4748 or email the Membership Card inbox (membcard@elks.org) rather than order the wrong cards. Once received, examine the cards to determine if all ordered were sent you, and then store them in a dry and locked area until used. Your initial order can NOT be done over the telephone; we must see the first order for the new cards in writing (online, email, fax, snail mail). Additional card orders will be accepted any time throughout the year over the telephone, provided it is not your first order for the new cards; it must be a supplemental order to be taken over the phone.

Each April 1, destroy all card stock from the previous year so that none can be forged by someone not entitled. Also, regardless of sentimental attachments, there are no valid reasons under our Laws for issuing an obsolete card, and a Member who pays the yearly amount as of October 1 should be given a half-year current card plus a receipt for either the past or future half-year dues.
LIFE MEMBERS

If your Lodge has provisions for Life Memberships, you should familiarize yourself with Section 14.260 of our Statutes that deals with Life Memberships either purchased or attained by length of membership. Also note Section 14.270 concerning Honorary Life Membership granted for Distinguished Services, in addition to the specific limitations that your Lodge is permitted in its By-Laws. These may include maximum number of Life Members allowed, higher age or length of membership (either total or in Lodge where applying), greater price for purchased type and many other variations above the minimums stipulated by Statute. NOTE: When calculating the amount for a PURCHASED LIFE MEMBERSHIP, the Life Member will still be obligated to pay the Grand Lodge and State Association portions plus an administration expense fee every year. Multiply “25” (or other multiplier stated in your By-Laws) times only the Lodge’s portion of the Member’s full annual dues [see By-Laws, Article X, Sec. 2(c)].

Our Statutes do not require every Lodge to offer Life Memberships. Lodges may decide the matter based on their particular circumstances. Before taking action, Members should consult both their Lodge By-Laws and the Order’s Statutes. The Secretary has an interest in keeping a constant supply of both books available to Members to head off conflict resulting from misinformation. No Life Memberships are granted automatically upon reaching the requirements published in the Lodge By-Laws. Each Member seeking Life Membership must apply in writing to the Lodge Secretary. There is no set form. Once received, the request should be reviewed for verification and, if found eligible, submitted to the Exalted Ruler for setting the Lodge vote (not later than the third regular meeting after the meeting in which the application is announced).

Remember that there must be both an application and a separate vote for each applicant. Voting for a group is not permitted. (Secretary-supplied paper ballots with all eligible names listed with “YES” and “NO” boxes satisfy this). While applicants may be elected any time, most Lodges set aside a special night for inducting newly-elected Life Members. Regardless of when a particular Member is elected to Life status, the special card and reduced dues do not become effective until April 1 of the succeeding Lodge year.

Our Laws also provide for a Life Member to apply to transfer his or her Life status to another Lodge, either on or after the point at which the Member applies for the Transfer Dimit. The vote on the Life status must be separate, and usually held before the vote on the Transfer Dimit itself, should granting of the Life Membership be an applying Member’s condition for pursuing the transfer. The request for the Life Membership Transfer must be submitted to the Lodge Secretary in writing as part of the application process, and each applicant must be voted on separately and receive a two-thirds majority approval. NOTE: Honorary Life Membership CANNOT be transferred!

LABELS FOR LODGE USE

Your care in keeping up your Lodge roster in the Magazine Circulation Department becomes apparent when you mail the Lodge bulletin or notices to your Members. Preprinted mailing labels can be obtained inexpensively from The Elks Magazine Label Department. We suggest you contact the Label Department for current offerings, or submit an order online through the Secretary Resource page at http://www.elks.org/CLMS2Web.

STRAY ELKS

A Stray Elk is one in GOOD STANDING who has moved from the jurisdiction of his home Lodge and now resides permanently in the jurisdiction of another Lodge. Many of these Members may eventually take Absolute Dimiters or be lost to our Order for nonpayment of dues unless they become interested in the activities of the nearest Lodge.

When Members are living in the jurisdiction (based on the Lodge’s ZIP Code “footprint”) of a Lodge other than their own, the Grand Secretary sends a “Stray Elk” report to the Lodge of residence.

Names of all Stray Elks residing in your Lodge jurisdiction should be added to your Lodge mailing list. Your Lodge is advised to write to these Members, welcoming them to your community and inviting them to visit your Lodge. However, this is no substitute for personal contact. If possible some Lodge Member who lives nearby should be assigned to invite the Stray Elk to take advantage of the facilities of your Lodge. Grand Lodge also urges that every Lodge hold a “Stray Elks Night” at least once a year, inviting them to join your Members for fellowship.

In metropolitan areas where some Lodges may be in close proximity to each other, Elks who are Members of one Lodge may show up on a neighboring Lodge’s Stray Elk list because they reside in that Lodge’s jurisdiction. Common sense dictates that these individuals not be pursued as Stray Elks. Contact those Elks who have moved from another state or those who are not Members of neighboring Lodges.

If your Lodge is just starting up a Stray Elk program, or if your program needs a fresh start, a complete listing of Stray Elks can be obtained from the office of the Grand Secretary by requesting the RPTX0160 printout. This printout is formatted so that you can copy the names and addresses onto Avery #5351 copier labels.

REVISION OF BY-LAWS

By-Laws for use as a guide by Local Lodges are prepared annually by the Committee on Judiciary. Each year the Grand Secretary mails these revised By-Laws to each Lodge and keeps a copy for the Local Lodges. In some years little or no change is made in these By-Laws, making a revision by the Local Lodge unnecessary. However, by Statute, every Local Lodge must make a general revision of its By-Laws at least every five years and more frequently if warranted by changes either made by Grand Lodge or by the Local Lodge. Statutory changes approved by Grand Lodge automatically go into effect 30 days after the July session and thus supersede those Statutes and By-Laws previously existing throughout the Order. But as Lodge Officers, the Exalted Ruler who attended the Grand Lodge
Session, assisted by the Secretary, are responsible for making sure all Lodge Members are informed of all changes, as these affect their rights and duties of membership.

When an existing Lodge needs a general revision of its By-Laws or a Lodge in formation prepares to adopt its first By-Laws before Institution, a By-Laws Committee should be appointed and given the Order’s latest Constitution and Statutes, as well as four copies of the latest Judiciary-approved Lodge By-Laws [Code 520501] available with an accompanying instruction sheet on request from the Grand Secretary. The Committee should then prepare its recommendations for changes to be presented for Lodge action. To make the proposed By-Laws representative of the Lodge, announcement should also be made that, in addition to changes recommended by the Committee, all Members may propose other changes. To ensure approval by the Grand Lodge Committee on Judiciary, the Lodge should study all pertinent sections of our Order’s Statutes and, wherever possible, use the wording as printed in the guide By-Laws booklets.

After favorable Lodge floor action, prepare three complete copies of the By-Laws booklets, as well as the general revision review check sheet, and send them to your Area Member of the Committee on Judiciary. The committee member will notify you of approval or disapproval with corrections indicated. He or she must also approve individual amendments to By-Laws sections, house rules, authority to publish a Lodge bulletin and Lodge incorporations. The committee member should also be contacted by a Lodge Officer whenever the Statutes need to be interpreted for clear-cut action. In these cases approval or interpretation must be obtained BEFORE further activity.

As Secretary you are required to present your Lodge By-Laws to each new Member. Within one year of the general revision approval, you may order printed By-Laws through the Grand Secretary (300 copies minimum order at prices far below those possible from local printers.) Every Secretary is advised to order enough to last the five years until the next general revision is required. When ordering these By-Laws with your Lodge’s figures already entered, you do not have to send your Lodge’s approved By-Laws, as Judiciary automatically sends them to the Grand Secretary. Since the printing takes 2-3 months, you may have to paste in entries by hand in the By-Laws booklets you have on hand for new Members until the next printing is shipped to you. This is acceptable practice. You may also order any quantity of the By-Laws Guide booklets (with blank spaces) during the five years after a general revision approval, but you must then enter the appropriate figures in the spaces throughout each book. Needless to say, when a Lodge violates the Statute requiring the 5-year general revision, Judiciary will not approve any isolated amendments submitted, nor is the Grand Secretary permitted to ship large quantities of By-Law Guide Booklets or to order printed By-Laws until the Lodge regains compliance by having a current general revision submitted and approved.

**INCORPORATION OF LOCAL LODGES, and BUYING, LEASING OR SELLING LODGE PROPERTY**

Actions that seriously affect Lodge life and status under both the Laws of the Order and community require a great deal of planning. Since the Statutes change from time to time, and only those in effect at the time the action is contemplated govern, we urge your Lodge to read and discuss the applicable Statutes at great length at that time. Also, if necessary, contact your Area Member of the Grand Lodge Committee on Judiciary (Incorporation) or appropriate Grand Trustee (Real Estate Transaction) for guidance.

Our Statutes cover these topics in detail, but several points should be made regarding your duties in connection with them. First, because the welfare of all Lodge Members is involved in the decisions, take special care that they are all informed of the complete situation and notified to take part in any votes or discussions affecting them. Second, be sure to keep your Past Grand Exalted Ruler Sponsor(s) and District Deputy up to date on all developments for the good of the Order. Third, for a consultant on these matters, as well as other matters in the Lodge, you should establish a friendly relationship with a Lodge Member or Members who are in the legal, financial and real estate professions. If none of your Lodge Members is so qualified, we suggest that the Membership Procurement Committee emphasize their recruitment.

**THE LAWS OF OUR ORDER**

A Secretary must become familiar with the Laws of our Order. They are easily understood and may be found with the help of the index. When in doubt or in differences of opinion, you should write your Area Member of the Judiciary Committee for an authoritative opinion. When you write, detail all the facts and circumstances involved.

**ELECTIONS — ANNUAL AND SPECIAL**

During elections, potential exists for misunderstandings that can damage the friendly relations necessary for any progress and fraternalism in our Lodges. Long before any election — the annual balloting in February or a special election to fill an unexpected vacancy — you can minimize friction by studying Statute Sections 3.080, 3.090 and 12.150. They are aimed at notifying the full membership of the candidates for office, and having any needed ballots and paraphernalia prepared in advance.

In addition, our Laws permit a candidate to campaign for a Lodge Office but not “by any public method or appeal” through the media for example. [Sec. 9.070.f.]. Also, you are not permitted to provide membership lists or addresses to any Members for any purpose including campaigning. Any Committee Members who have such lists to perform their Committee duties are not permitted to use the lists for campaigning. The Exalted Ruler should enforce these restrictions under his power of appointment and removal for any offending Committee Member. Another type of election for which you must prepare ballots and notify the membership is covered in the Life Membership section of this book.
LODGE BULLETIN

Many Secretaries act as Lodge bulletin editor/publisher in addition to their other duties, primarily because they are most knowledgeable of the ongoing Lodge activities. When accepting this responsibility, notify all Lodge Officers, Committees and Members of your need for advance information on all Lodge matters, emphasizing the deadline for submitting articles.

Publishing a monthly article from the Exalted Ruler is a good idea, in addition to regular features from other Officers or Lodge auxiliary. If your Lodge serves meals, listing of menus will help attract more Elks families. Most bulletins include a calendar of Lodge events. As explained later, you should let Lodge Members know that they can consult their current District Deputy, whose name, address, phone number and email address should be listed in every Lodge bulletin.

Also, make sure you are on the mailing lists of bulletins from as many Lodges, Districts, State Associations and other Elks groups (bowlers, golfers, RV clubs, etc.) to provide source material. In addition, you should maintain a miscellaneous file of humor, sports tips, artwork, BPOE history, etc. in lengths of 5-45 typewritten lines to fill space as needed. We caution editors against using copyrighted material without the permission of the publisher or artist/author.

To offset the expense of the bulletin, you may solicit paid advertising from businesses, but these must be no larger than standard business card size. If the business is of a Lodge Member or an Elk, the advertisement cannot refer to membership in the Order in any way. U.S. Postal Service regulations governing reduced rates for nonprofit mailings such as bulletins, prohibit certain advertising. Every Lodge should obtain these guidelines from their Postmaster to ensure their publication conforms (or run the risk of drastically higher postage and even penalties on prior mailings).

An alternative to ads is the “Boosters” program used successfully by many Lodges. This is a line-by-line listing of names of families or businesses that contributed funds to defray printing/mailing costs. In considerably less space, the same (or more) revenue is generated without the risk or complexity of ads, and Lodge Members get the satisfaction of seeing their names or memorials in print.

We cannot over-emphasize that neither the advertisements nor the rest of the bulletin can contain any item of a “shady” nature, nor should religious or political viewpoints or candidacies appear in the Elks bulletin.

Extremely useful in preparing bulletins is a copier with enlargement and reduction capabilities, and a convenient source of artwork is a Member’s computer with graphics software. Elks emblems are available free from the Grand Secretary’s office for the use of your bulletin. DON’T FORGET TO PUT THE GRAND EXALTED RULER, GRAND SECRETARY, PGER SPONSOR, SPECIAL DEPUTY, DISTRICT DEPUTY AND STATE ASSOCIATION PRESIDENT ON YOUR BULLETIN MAILING LIST! Before you publish your first issue, however, you should verify if your Lodge has received approval to do so by checking with your Area Member of the Grand Lodge Committee on Judiciary. For approval, first have the Lodge vote in favor of the bulletin by following the same procedure as for amending By-Laws, and then submit the request for approval in triplicate to Judiciary, per Section 16.150 of the Statutes.

LODGE TRANSACTIONS REPORT

Membership, and the resulting collection of dues and fees, is vital to the viable operation of the Elks Lodge. As such, an important duty of the Lodge Secretary is compiling semiannual Lodge Transactions Reports as required under Section 12.050 (m) of the Grand Lodge Statutes. (Appendix—Exhibit N) At the first Lodge meeting in April and October, the Lodge Secretary is to detail membership figures from the previous six-month reporting period. Those figures should include: initiations, reinstatements, delinquencies, number of candidates awaiting initiation, transfers, drops for nonpayment of dues, absolute dimits, deaths and expulsions.

Collections should center on the amount of dues collected and to be collected; and also the per capita fees paid and to be paid to Grand Lodge, the State Association and District. The status of the five-year revision of Lodge bylaws also is noteworthy.

YOUR DDGER’S ROLE AS ADVISER

While you have become a “resident expert” on the Laws and procedures for your Lodge and the Order out of necessity, there are still times in the life of every Exalted Ruler and Secretary when a difference of opinion will arise with some of your less-informed Members, which requires a go-between. Those Members may want the viewpoint of some authority from outside the Lodge to settle the matter. Every year in July, a new District Deputy Grand Exalted Ruler is appointed to assist and supervise your Lodge. He or she will provide your Lodge with a picture. Post it prominently on the Lodge bulletin board or photo gallery, of course, but do yourself a favor and provide a “safety valve” for Members who want additional advice or assistance by also posting the DDGER’s business card with the picture so any Member can easily get in touch for advice. With both this in-Lodge posting and the DDGER’s listing in every bulletin, every Member will not only have an additional resource to call on, but will have increased awareness of participation in the expanded world of Elkdome that reaches out into your District and our national Order. And as Secretary, you also have the annual duty of putting up for the Members’ benefit the pictures of our Grand Exalted Ruler, your State’s Sponsoring Grand Exalted Ruler and your State President, as well as any motivational posters. All of these are sent through you to your Lodge throughout the year for good reasons. “Share” them with your Members.
MANDATORY INSURANCE PROGRAMS

Self-Insured Master Liability Program
(Statutes of the Order, Section 4.231)

In 1984, Grand Lodge adopted a liability insurance program to provide coverage for all Local Lodges, State Associations (except their major projects) and the Grand Lodge (NOTE: coverage is effective for proposed new Lodges once the Grand Exalted Ruler grants dispensation). As noted in the Statutes, all Lodges must participate in this Program, which provides each Lodge with general liability and liquor liability coverage. All liability insurance information is available in the Liability Insurance Program booklet (Code 51300), which is updated and sent to the Lodge Secretary on an annual basis (additional copies can be obtained from the Grand Lodge Shipping Department or www.elks.org/resources/accident/). This booklet provides information as to procedures, coverage, claims reporting, and loss prevention as well as a list of exclusions, which include claims made that involve employees; occur as a result of pollution; involve owned automobiles, etc.

This liability coverage is paid for as part of the annual per capita payment to Grand Lodge; Lodges are not responsible for additional premiums under any experience rating or audit process, nor is there any deductible.

Important Notice Regarding the Service of Alcohol:

The membership has been informed of a recent verdict totaling $28 million (including $10 million in punitive damages*) in a case involving a Local Lodge in Pennsylvania; it was alleged that a non-Elks member was improperly served alcohol while attending an Elks sponsored function.

It is essential that Local Lodges properly control the service of alcohol. It is also crucial that Local Lodges recognize the primary reason they have a liquor license and maintain bar facilities, which is to provide the service of alcohol to Lodge members and their guests. Under no circumstances should Local Lodges view the service of alcohol as a commercial activity for service to the public.

It has been stated many times that no person approaching intoxication should ever be served (anyone who violates this policy should be terminated). Those serving alcohol should be trained to count the number of drinks provided to an individual; therefore, it is strongly recommended that all those involved in the service of alcohol—including volunteers—take a training course.

Local Lodges that rent out their facilities (for weddings, parties, etc.) in accordance with the Statutes’ “Closed Door Policy” must remember that the person or entity renting the Lodge must provide a signed indemnity agreement and name the Local Lodge as additional insured on the renter’s general liability policy (see Pages 10-12 of the Liability Insurance Program booklet mentioned above for guidelines; a sample indemnification form; and a sample “Certificate of Liability Insurance” form). If the renter cannot obtain a Certificate of Insurance that names the Local Lodge as additional insured, the renter can purchase an “event policy” from one of many such providers that can be found locally and on the Internet or by calling Aon Affinity Services at 1-800-421-3557.

*Please note that, while the Master Liability Program does provide coverage for punitive damage awards, there are some states that do not allow punitive awards to be insured, which would make the Local Lodge responsible for such awards.

Self-Inspection Forms:

Local Lodges are encouraged to complete a Self-Inspection form on a regular basis throughout the Lodge year (go to www.elks.org/resources/accident/ for additional copies). The Local Lodge’s Accident Prevention Manager (Trustee) are encouraged to share these completed Self-Inspection forms with the District Deputy and will assist the District Deputy in completing a Self-Inspection form during the official DD visit.

Questions pertaining to coverage may be directed to:

Grand Lodge Insurance Department
2750 N. Lakeview Avenue
Chicago, IL 60614-1889
Phone: (773) 755-4714 • Fax: (773) 755-4715
Email: insurance@elks.org

All liability-related incidents MUST BE IMMEDIATELY REPORTED to:

GALLAGHER BASSETT SERVICES, INC.
P.O. Box 7110
Oakbrook Terrace, IL 60181
Phone: (800) 962-7088 • Fax: (800) 223-7006
Email: GB-Oakbrook_Terrace-Mail@gbtapa.com

Self-Insured Property Plus Program
(Statutes of the Order, Section 4.232)

In July 1991, a comprehensive program was adopted to protect the properties and functions of the Local Lodges and the Grand Lodge. As noted in the Statutes, all Local Lodges must participate in this Program, which provides coverage on buildings and contents on a replacement-cost basis without the application of co-insurance requirements. In addition to insurance on the Local Lodge’s buildings and contents, the Property Plus Program also includes fidelity (crime) coverage.

Most importantly, at the minimum coverage level (or $50,000), this fidelity (crime) coverage satisfies the statutory bonding requirements in the Statutes of the Order.

As insurance broker, program administrator and claims reporting service for the Property Plus Program, Aon Affinity Services bills the Local Lodges on an annual basis (April 1st); premiums are based on the values on file (a free property appraisal is available to determine current replacement values). Local Lodges with no building to insure and little or no business personal property (contents) are exempt from mandatory participation in the Property Plus Program; however, such Lodges can still purchase the fidelity (crime) coverage through the Property Plus Program for a minimal premium.

Requests for copies of the Property Plus Insurance Program manual and all questions pertaining to coverage and limitations, claims reporting and loss prevention should be directed to the Elks Team at:

AON AFFINITY SERVICES, INC.
200 East Randolph Street, Fourth Floor
Chicago, Illinois 60601
Phone: (800) 421-3557 [ELKS] • Fax: (312) 381-2751
VOLUNTARY INSURANCE PROGRAMS

WORKERS COMPENSATION:
This coverage is the exclusive remedy for occupational injury claims; therefore, all Local Lodges should have such coverage—even if it has no regular employees—as accident policies are insufficient.

A voluntary Workers Compensation Program is available to Local Lodges that may offer lower rates. Most importantly, coverage can be obtained for volunteers in most states (for Lodges that choose to do so). Local Lodges should call Lockton Risk Services directly at 1-877-735-6349 for more information.

DIRECTOR AND OFFICERS/EMPLOYMENT PRACTICES (D&O):
It is strongly recommended that Local Lodges participate in this voluntary discounted program, which includes employment practice coverage. The policy provides defense for allegations of wrongful acts by officers, directors or members in the management of the Local Lodge; the policy also provides defense for allegations of employment practice type claims, including wrongful discharge, discrimination and harassment. Local Lodges can obtain a quote by calling Aon Affinity Services at 1-800-421-3557 (the insurance agent or insurance company will bill Local Lodges directly for this coverage).
— APPENDIX —
STATUTORY DUTIES OF LODGE SECRETARY

Section 12.050. The Secretary of the Lodge shall:

a. Keep accurate minutes of all meetings.

b. Maintain accounts between the Lodge and its Members.

c. Assign to each Member a number, which is shown on their membership card.

d. Receive all monies due the Lodge and pay them over to the Treasurer.

e. Inform applicants for membership of their acceptance or rejection.

f. Notify all Committee Appointees.

g. Prepare the Annual Report to the Grand Lodge.

h. Prepare a period membership report on forms furnished by the Grand Secretary as of the first day of November of each year. The report is due on or before the fifth day of November.

i. Report all expulsions and suspensions to the Grand Secretary.

j. Read and answer all correspondence of the Lodge subject to the approval of the Exalted Ruler.

k. Give bond of at least $5,000 or in a greater amount as may be provided in the By-Laws (this is automatic under Property Plus $50,000 bond).

l. Present a written report of the transactions of his office to the Lodge at the first session in April and October.

m. Receive compensation as fixed by the By-Laws.

n. Perform all duties required by the Local Lodge Forum.

o. Attend all District Deputy Clinics unless excused for good cause.
LODGE SECRETARY WILL HAVE THE SUCCEEDING INFORMATION READY AND LAID OUT FOR DISTRICT DEPUTY VISIT, IN THE FOLLOWING ORDER

Lodge Name and Number______________________________________________Date__________________

1. All items on the check sheet, printed on the reverse side, in listed order.

2. Current membership __________, and year-to-date ENF donations $ __________.

3. Copy of Grand Lodge Area Auditing & Accounting Committee evaluation form.
   a) Have GL Committee questions or comments been replied to and/or complied with? ☐ Yes ☐ No

4. Date IRS Form 990/990T mailed ________________

5. Copy of Lodge By-Laws with general revision date. Date __________

6. Copy of Lodge House Rules with general revision date. Date __________

7. Salaries: Secretary $ __________; Treasurer $ __________; Tiler $ __________; Organist $ __________; Vocalist __________

8. Initiation fee $ __________; Annual Dues $ __________; Reinstatement fee $ __________

9. Amount of fire insurance $ __________; date when last adjusted __________

10. Number of meetings missed by Lodge Officers, to date:
   E.R. ______; Leading Knight ______; Loyal Knight ______; Lecturing Knight ______; Secretary ______;
   Treasurer ______; Tiler ______; Esquire ______; Chaplain ______; Inner Guard ______; Organist ______;
   1 year Trustee ______; 2 year Trustee ______; 3 year Trustee ______; 4 year Trustee ______; 5 year Trustee ______

11. Is the Lodge incorporated? ☐ Yes ☐ No Date of incorporation __________

12. What is current combined indebtedness of Lodge? $ __________

13. Current Profit/Loss Statement for each entity (Lodge, Club, Bingo, etc.).

14. Has Exalted Ruler appointed a Presiding Justice? ☐ Yes ☐ No; a Mediator? ☐ Yes ☐ No [GLS 13.020]

15. Does Lodge have Ritual coaching and are Lodge Officers able to recite Rituals from memory? ☐ Yes ☐ No

16. Has Exalted Ruler scheduled an Elks Training Session? ☐ Yes ☐ No
   Will that be done? ☐ Yes ☐ No

17. Does Lodge Secretary submit written transaction reports to the Lodge at 1st sessions in April and October? ☐ Yes ☐ No [See Exhibit N]

18. Does Board of Trustees submit written reports to the Lodge at 1st sessions of each month? ☐ Yes ☐ No

19. Does Lodge have an active P.E.R. Association and does it hold required meetings? ☐ Yes ☐ No [GLS 13.190]

Please have P.E.R. Association minutes available for District Deputy! Minutes of this body should be held in the Lodge office and be available at all times. All funds generated or held by a P.E.R. Association, other than P.E.R. Association Dues, belong to the Lodge, may only be used if budgeted and approved by the Lodge, and are subject to audit by the Lodge. [GLS 13.190, Opinion 02]
<table>
<thead>
<tr>
<th><strong>Name and No. of Lodge:</strong></th>
<th><strong>Birthplace:</strong></th>
<th><strong>Admitted on Dimit or Release From:</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Proposer:</strong></td>
<td><strong>Date of Birth:</strong></td>
<td><strong>Dimitted or Released to Join:</strong></td>
</tr>
<tr>
<td><strong>References:</strong></td>
<td><strong>Proposed:</strong></td>
<td><strong>Dropped for Non-Payment:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Elected:</strong></td>
<td><strong>Suspended: From</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Indoctrinated:</strong></td>
<td><strong>to</strong></td>
</tr>
<tr>
<td><strong>Investigating Committee:</strong></td>
<td><strong>Initiated:</strong></td>
<td><strong>Reinstated:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Affiliated:</strong></td>
<td><strong>Deceased:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Granted–Transfer Dimit:</strong></td>
<td><strong>Became Life Member:</strong></td>
</tr>
<tr>
<td><strong>Occupation:</strong></td>
<td><strong>Granted–Absolute Dimit:</strong></td>
<td><strong>Exalted Ruler:</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Granted–Cert. of Release:</strong></td>
<td><strong>Secretary</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>DATE</strong></th>
<th><strong>DUES TO</strong></th>
<th><strong>DEBIT</strong></th>
<th><strong>DATE</strong></th>
<th><strong>CREDIT</strong></th>
<th><strong>DATE</strong></th>
<th><strong>DUES TO</strong></th>
<th><strong>DEBIT</strong></th>
<th><strong>DATE</strong></th>
<th><strong>CREDIT</strong></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th><strong>ADDRESS</strong></th>
<th><strong>NAME</strong></th>
<th><strong>NO.</strong></th>
</tr>
</thead>
</table>

CODE 550500
**An Invitation to Join the Benevolent and Protective Order of Elks of the United States of America**

**MEMBERSHIP APPLICATION**

Provide no references other than the Proposer. All must be Members of the Order.

<table>
<thead>
<tr>
<th>Name</th>
<th>Membership No.</th>
<th>Lodge Name &amp; No.</th>
<th>Home Address</th>
<th>Business Address</th>
<th>Telephone</th>
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<th>Home Address</th>
<th>Business Address</th>
<th>Telephone</th>
<th>E-mail</th>
</tr>
</thead>
</table>

**PROPOSER**

I understand that standards for becoming a Member of the Order of Elks are high, that membership is attained by invitation only, and is limited to persons of good moral character who believe in God. In proposing this applicant for membership, I attest that I have known the applicant for _______ (Months/Years), that he/she is morally, socially and financially responsible; and, in my opinion, will become an active Member who supports our beliefs. In the event that the applicant is approved and accepted, I pledge my personal interest to his/her development and progress in becoming a Member of the Order of Elks.

Signature
___________________________________________________________

Membership Number __________________

(Date) ___________________

---

**Cooperative Program**

Care — Share

---

**APPLICANT**

Check the Committee Preferences from the lists below:

**CIVIC/COMMUNITY**

___ Americanism ___ State Major Project
___ Blood Drives ___ Law and Order
___ Boy/Girl Scouts ___ Other __________________
___ Charity ___ Scholarship
___ Community Affairs ___ Summer Camps
___ Community Welfare ___ Veterans Services
___ Drug Awareness ___ Youth Activities
___ Elks Hospitals/Clinics ___ Youth Sports
___ Essay/Poster Contests ___ Team Sports

**LODGE ACTIVITIES**

___ Auditing/Financial ___ Games
___ Bingo ___ Greeter
___ Breakfast/Dinners ___ Lodge Bulletin
___ Bridge/Card Clubs ___ Lodge Visitation
___ Building Maintenance ___ Membership
___ Bus/Boat Trips ___ Other ___________________
___ Charity Fund-Raising ___ Parties/Dances
___ Conventions ___ Photography
___ Decorations ___ Public Relations
___ Entertainment ___ State Major Project
___ Elks National Foundation ___ Team Sports
___ Family Activities ___ Visitation of Sick
___ Fellowship ___ Visitation of Other

---

I would be interested in serving as an Officer of the Lodge (Yes/No) _ _ _ _ _ _ _ _ _ _

---

**PROPOSER**

I hereby declare the above application is accurate and true.

Signature
___________________________________________________________

Membership Number __________________

(Date) ___________________
Proposal for Membership
Benevolent and Protective Order of Elks of the United States of America

Proposer: ____________________________________________ (Name of Proposer)
__________________________________________ (Membership No.)
__________________________________________ (Signature of Proposer)

Address: ____________________________________________
City: ____________________ State: ______ Zip: ______ -

E-mail Address: ____________________ Telephone Number: ____________________

Proposes:

Legal name of applicant ____________________________________________ (M) (F) (circle one)

Name of spouse ____________________________________________

Home address ____________________________________________
City, state & zip ____________________________________________

Personal telephone number ____________________ E-mail ____________________

Business telephone ____________________ E-mail ____________________

To Be Answered by the Applicant

— PLEASE PRINT OR TYPE —

1. Applicant was born in the city of: ____________________________ County: ____________________________
   State: ____________________________ Month: ____________________________ Day: ____________________________ Year: ____________________________

2. Do you believe in God and are you willing to attest to that belief? ____________________________

3. Are you a citizen of the United States of America? ____________________________

4. If foreign born, when and where were your final naturalization papers issued:
   Month: ____________________________ Day: ____________________________ Year: ____________________________ at: ____________________________

5. Are you willing to assume an obligation that:
   (a) Will not conflict with your duties to yourself, or your family, or your religious or political opinions, and that
   (b) Will bind you to uphold the Constitution and laws of the United States of America? ____________________________

6. Are you now a member of or directly or indirectly participating in the activities of any group or organization, or supporting or adhering to beliefs or tenets advocating the overthrow of the Government of the United States or any of its political subdivisions by force or violence? ____________________________

7. Have you ever pled guilty or no contest to, or been convicted of, a felony or crime of moral turpitude? ____________________________

8. (a) Have you ever served in the armed forces of the United States of America? ____________________________
   (b) If yes, state the type of discharge and branch of service: ____________________________

9. (a) Have you ever been proposed for membership in any Elks Lodge? ____________________________
   (b) If yes, Lodge: ____________________________ Date: ____________________________ Result: ____________________________

10. Have you been a bona fide resident within the jurisdiction of this Lodge immediately preceding the date of this application? ____________________________

11. (a) Provide two references other than the Proposer. All must be Members of the Order. (Fill out form on back panel.)
    (b) List all places of residence and your occupation for the 5 years preceding the date of this application if different from the address and/or occupation given on reverse side. (Fill out form on back panel.)

EXCERPTS FROM LAWS OF THE ORDER

The Lodge Dues are per annum and may be paid semi-annually in advance of April 1st and October 1st of each year or annually in advance on April 1st of each year, as provided in the By-Laws of the Lodge. An Applicant rejected must wait six months before reapplying for membership. Rejected Applicants shall have their Initiation Fees returned to them by the Lodge.

Should a Candidate fail, without good cause, to appear for Initiation within four months from the date of the Candidate’s election, the Exalted Ruler shall declare the Candidate’s right to Initiation (under such application and ballot) and also the Candidate’s Initiation Fee forfeited.

I understand that this application must be fully completed and accompanied by an initiation fee of $ ____________________. I further understand that pro-rata membership dues, for the current year, must be paid at the time of initiation.

__________________________________________ (Signature of Applicant)
__________________________________________ (Date)

Code 560700 Revised October 2013

23
Application for Reinstatement

Benevolent and Protective ORDER OF ELKS

of the United States of America

APPLICANT:

I express a preference to serve on the Committee or Committees circled below:

- Americanism
- Charities
- Community Affairs
- Elks Hospitals
- Handicapped Children
- Scholarships
- Essay Contests
- Boy/Girl Scouts
- Youth Sports
- Lodge Entertainment
- Bridge/Card Clubs
- Conventions
- Lodge Maintenance
- Publicity
- Bulletin
- Breakfasts/Dinners
- Decorating
- Auditing
- Lodge Visitation
- Drug Awareness
- Community Welfare
- Law & Order
- Elks Clinics
- Summer Camps
- Poster Contests
- Blood Drives
- Veterans Services
- Other Activities
- Lodge Sports
- Games
- Bus/Boat Trips
- Photography
- Bingo
- Sick Visitation
- Parties/Dances
- Greeter
- Membership
- Family Activities

PROPOSER:

I realize that membership in the Elks is attained by invitation only, that the standards for membership are high and limited to persons of good moral character and who believe in God. In proposing this applicant, I attest that they are morally, socially and financially responsible; and that, in my estimation, will become an active member, in support of our beliefs.

If applicant is approved and accepted, I pledge my

__________________________________________

Signature of Proposer Date

[PROPOSER REFERENCES]

Provide two references other than the Proposer. All must be Members of the Order.

<table>
<thead>
<tr>
<th>Name</th>
<th>Membership No.</th>
<th>Lodge Name &amp; No.</th>
<th>Home Address</th>
<th>Business Address</th>
<th>Telephone</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

List all places of residence and your occupation for the 5 years preceding the date of this application if different from the address and/or occupation given on reverse side.

Place of Residence:  Date (Established/Changed):  Occupation:  Telephone:

Place of Residence:  Date (Established/Changed):  Occupation:  Telephone:

APPLICATION PROCESSING RECORD

Committee on Membership Recommendation

The undersigned Committee on Membership reviewed the application of

________________________________

for membership in the

BPO Elks USA (Date)

________________________

and found:

Favorably: __________

Unfavorably: __________

Signatures of Committee Members:

______________________________

______________________________

______________________________

______________________________

To be completed by the Lodge Secretary

Signature of Lodge Secretary

Date

RESULT OF BALLOT

Lodge: __________  Accepted: __________  Rejected: __________

PROPOSED: I realize that membership in the

Elks is attained by invitation only, and that the standards for

morals and character are high and limited to persons of good

character and who believe in God. In proposing this applicant, I

express a preference to serve on the Committee or Committees

circled below:

- Americanism
- Charities
- Community Affairs
- Elks Hospitals
- Handicapped Children
- Scholarships
- Essay Contests
- Boy/Girl Scouts
- Youth Sports
- Lodge Entertainment
- Bridge/Card Clubs
- Conventions
- Lodge Maintenance
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- Bulletin
- Breakfasts/Dinners
- Decorating
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- Law & Order
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- Blood Drives
- Veterans Services
- Other Activities
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- Bus/Boat Trips
- Photography
- Bingo
- Sick Visitation
- Parties/Dances
- Greeter
- Membership
- Family Activities

APPLICANT:

I express a preference to serve on the Committee or Committees circled below:

- Americanism
- Charities
- Community Affairs
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- Sick Visitation
- Parties/Dances
- Greeter
- Membership
- Family Activities
Application for Reinstatement
Benevolent and Protective Order of Elks
of the United States of America

(Please print legibly)

Proposer: 1 (Name of Proposer) (Membership No.) (Signature of Proposer)

Address: __________________________________________ City: ______________ State: _____ Zip: ______ - ________

E-mail Address: __________________________________________ Telephone Number: __________________________

1. Proposes:

<table>
<thead>
<tr>
<th>Male ☐ Female ☐</th>
<th>___________________________</th>
<th>Male ☐ Female ☐</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal name of applicant</td>
<td>Occupation</td>
<td>Legal name of applicant</td>
</tr>
<tr>
<td>Name of spouse</td>
<td>Business name</td>
<td>Name of spouse</td>
</tr>
<tr>
<td>Home address</td>
<td>Business address</td>
<td>Home address</td>
</tr>
<tr>
<td>Home city, state &amp; zip</td>
<td>Business city, state &amp; zip</td>
<td>Home city, state &amp; zip</td>
</tr>
<tr>
<td>Personal or cell telephone number</td>
<td>Business telephone</td>
<td>Personal or cell telephone number</td>
</tr>
<tr>
<td>Personal e-mail address</td>
<td>Business e-mail address</td>
<td>Personal e-mail address</td>
</tr>
</tbody>
</table>

2. Born in the City of __________________, in the County of ______________, located in the State of ______________ on the _______ day of __________________, in the year of ________.

3. Applicant was a Member of________________________________________ Lodge No. _______ in the State of ______________.

   He or she was: ☐ dropped for nonpayment ☐ granted an Absolute Dimit

4. The applicant is advised that he/she may be Reinstated to membership in this Lodge upon payment of the following:

   Reinstatement Fee. . . . . . . . . . . . . . $ __________

   *Proportionate Dues . . . . . . . . . . . . . $ __________

   *TOTAL . . . . . . . . . . . . . . . . . . . . . . . . . $ __________

Applicant hereby gives his/her consent that this application may be investigated and state that he/she has never pled guilty or no contest to, or been convicted of, a felony or crime of moral turpitude.

[Signature of Applicant] [Date]

*Before Reinstatement, the Applicant shall pay the Reinstatement Fee fixed by the Lodge By-Laws, which may not be less than fifteen ($15.00) dollars, and the proportionate share of the current dues. (See Section 14.180, Laws of the Order, and current Lodge By-Laws)
APPLICATION FOR AFFILIATION IN

Benevolent and Protective Order of Elks
of the United States of America

(Please print legibly)

I, the undersigned, under the Obligation of the Order, hereby make application to be Affiliated in this Lodge and State:

________________________________________________________________________________________________________

1. By Transfer Dimit from ___________________________________________ Lodge No. ____________________
2. By Absolute Dimit from ___________________________________________ Lodge No. ____________________
3. By Certificate of Release from ___________________________________________ Lodge No. ____________________

4. Name___________________________________________________ Spouse's Name________________________ Email_______________________________
   Home Address_____________________________________________________ City______________________ Zip______________ Phone_________________________
   Business Name______________________________________________________________________________ Occupation_________________________________________
   Business Address___________________________________________________ City______________________ Zip______________ Phone_________________________

5. State the place and date of your birth: Answer: Born in City of ___________________________________________
   County of_________________________________________ State of__________________ on the__________ day of________________________ in year_________.

6. Have you ever been a Member of this Lodge? ________________________________

7. I am advised that I may be affiliated to membership in this Lodge upon payment of the following:
   *Affiliation Fee ............................................... $ __________________
   *Semi-Annual Dues ........................................ $ __________________
   Total .............................................................. $ __________________

8. Give references of at least two Members of this Order, stating the name, home address, and business address of each.
   Name | Home Address | Business Address | Phone
   ------|-------------|------------------|------
   
   
I hereby state that I have never pled guilty or no contest to, or been convicted of, a felony or crime of moral turpitude.

Date____________________________, __________________________ Signature of Applicant

*The individual seeking Affiliation shall pay such fee as may be provided by the By-Laws of the Lodge to which Application is made. Said fee for an Applicant on Certificate of Release shall in no case be less than fifteen (15) dollars [Section 14.180, Laws of the Order]. No minimum affiliation fee is established for the holder of a dimit. [Section 14.110, 14.120, Laws of the Order]. (See also "Certificate of Status," [Sections 14.230, 14.250, Laws of the Order]).

560100/0200 REV. 4/2012
TO: _____________________________________________________________, Secretary
Lodge No. __________________________

Address: __________________________________________________________________________

City: __________________ State: _______ Zip Code: ______________

Dear Lodge Secretary:

I, the undersigned, respectfully request the issuance of

☐ a Transfer Dimit
(In accordance with Section 14.110, Laws of the Order)

OR

☐ a Certificate of Release
(In accordance with Section 14.180, Laws of the Order; the $20.00 Certificate of Release fee is enclosed)

to permit me to apply for Affiliation with: ___________________________________________________________

Lodge No. __________

Address: __________________________________________________________________________________________

City: __________________ State: _______ Zip Code: ______________

Lodge Secretary, please send this to the Secretary of the above indicated Lodge.

Signature of Member: ________________________________________________________________________________

Member’s Name (print): ____________________________________________________________________________

Member’s Address: _________________________________________________________________________________

City: __________________ State: _______ Zip Code: ______________

DATE ____________________________

Code 561300—Revised November 2008
DOE, JOHN 002123

Lodge
Proposer
Occupation
Spouse
Home Phone
DUES PAID TO:

Birthplace
Date of Birth
Proposed
Elected
Inducted
Initiated
Affiliated
Granted-Transfer Dirit

Adm-Dir/Rel From
Dim/Rel To Join
Dropped (non_pay)
Suspended From
to:
Expelled
Reinstated
Deceased
Became Life Mem.

EXHIBIT H
CLMS — Transfer Dimit

ADDRESS
NAME
No.

425 W. DIVERSEY PKWY
CHICAGO, IL 60614-

JOHN DOE
002123

CODE 5505

TRANSFER DIMIT

Lodge Name #5555 Lodge
No. 3000

Date 12/22/2008

Member JOHN DOE 002123

Upon Member's own application was this day granted a Transfer Dimit:
To apply for membership in

Lodge Name #5555 B. P. O. Elks

Upon Member's own application, this Dimit has been granted to this Member
that this Member may apply, within thirty days, for membership in

Lodge, No. B. P. O. Elks

OR

That he may sign a petition for dispensation
for and join a new Lodge to be instituted in

Lodge, No. 0003

Should Member fail to affiliate with the last mentioned, Lodge, in accordance
with the provision of the Laws of the Order, this Dimit shall be void and
membership of the person named shall continue in the Lodge granting this Dimit.

DATE
JOHN JENNINGS Exalted Ruler

NOTE: Secretary of the Lodge to whom this Dimit is addressed should at once
notify the Secretary issuing same of the affiliation or rejection of the Member.

CODE 552200

TRANSFER DIMIT

Lodge Name #5555 Lodge

BENEVOLENT AND PROTECTIVE ORDER OF ELKS

Date 12/22/2008

TO ALL ELKS, Greeting:

JOHN DOE 002123

Is a Member in Good Standing of Member No.

Lodge Name #5555 B. P. O. Elks

and all of Member's indebtedness has been paid up-to-date as required by our Laws.

Upon Member's own application, this Dimit has been granted to this Member
that this Member may apply, within thirty days, for membership in

Lodge, No. B. P. O. Elks

OR

That he may sign a petition for dispensation
for and join a new Lodge to be instituted in

Lodge, No. 0003

Should Member fail to affiliate with the last mentioned, Lodge, in accordance
with the provision of the Laws of the Order, this Dimit shall be void and
membership of the person named shall continue in the Lodge granting this Dimit.

DATE
JOHN JENNINGS Exalted Ruler

NOTE: Secretary of the Lodge to whom this Dimit is addressed should at once
notify the Secretary issuing same of the affiliation or rejection of the Member.

CODE 552200

NOTICE OF AFFILIATION
by TRANSFER DIMIT

Date 12/22/2008

Member JOHN DOE 002123

holding Transfer Dimit from

Lodge Name #5555 Lodge

No. 3000

was this day elected or rejected

by Lodge No. 0003

NOTE: Upon acceptance or rejection, this form is to be filled out and mailed immediately to the
Secretary of the Lodge in charge of the Dimit.
EXHIBIT I

CLMS — Certificate of Release

JOHN DOE

<table>
<thead>
<tr>
<th>Lodge</th>
<th>Birthplace</th>
<th>Adm-Dim/Rel From</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td>Expelled</td>
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<td>Reinstated</td>
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<td>Deceased</td>
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<td></td>
<td></td>
<td>Became Life Mem.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Exalted Ruler</td>
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<tr>
<td></td>
<td></td>
<td>Secretary</td>
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<table>
<thead>
<tr>
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<th>Proposed</th>
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<tbody>
<tr>
<td>Occupation</td>
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<td></td>
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<tr>
<td>Spouse</td>
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<td>Elected</td>
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<td>Home Phone</td>
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<td>DUES PAID TO:</td>
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<td>Affiliated</td>
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<td></td>
<td>Granted-Transfer Dimit</td>
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<tr>
<td></td>
<td></td>
<td>Granted-Absolute Dimit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Granted-Cif. of Release</td>
</tr>
</tbody>
</table>

ADDRESS
425 W. DIVERSEY PRKWY
CHICAGO IL 60614

NAME
JOHN DOE
No. 002123

CERTIFICATE OF RELEASE
Under Section 14-180, B.P.O.E. Statutes

LODGE NAME #5555
BENEVOLENT AND PROTECTIVE ORDER OF ELKS

TO ALL ELKS, Greeting:

This is to certify that JOHN DOE

was a member of LODGE NAME #5555.

and on (date) 12/01/2008 was dropped from the rolls for
non-payment of dues.

This CERTIFICATE OF RELEASE is granted for the purpose of
enabling said Member to apply for membership in:

0003 Lodge, No. 12345

JOHN JENNINGS Exalted Ruler

(SEAL)

DENNIS E. SCHROEDER Secretary

NOTE: Lodge Secretary is to fill in necessary information requested above.
560800 Rev. 10/2005
BENEVOLENT AND PROTECTIVE ORDER OF ELKS

ABSOLUTE DIMIT
LODGE NAME #5555

DOE, JOHN 002123

- Lodge Proposer: [details]
- Occupation: [details]
- Spouse: SUSAN
- Home Phone: [details]
- DUES PAID TO: [details]

- Birthplace: [details]
- Date of Birth: 11/26/1965
- Proposed: 12/01/2008
- Elected: [details]
- Undorsed: [details]
- Initiated: 12/10/2008
- Affiliated: [details]
- Granted-Transfer Dimit: [details]
- Granted-Absolute Dimit: [details]
- Granted-Ref. of Release: [details]

Initiation Fee in this lodge: $25.00

ADDRESS
425 W. DIVERSEY PREWY
CHICAGO ILL. 60614.

NAME No.
JOHN DOE 002123

ABSOLUTE DIMIT
LODGE NAME #5555

TO ALL ELKS. Greeting:

DATE: 12/27/2008

JOHN DOE 002123

upon Member's own application was granted an

ABSOLUTE DIMIT

on [Date]

Dennis E. Schroeder
Secretary

Code 552100
### TREASURER'S CASH BOOK

**Receipts and Expenditures**

<table>
<thead>
<tr>
<th>Date</th>
<th>RECEIVED FROM</th>
<th>Amount</th>
<th>Date</th>
<th>TO WHOM PAID</th>
<th>No. of Order</th>
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<tbody>
<tr>
<td></td>
<td>Brought forward</td>
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<td></td>
<td></td>
</tr>
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</table>

### SECRETARY'S CASH BOOK

**Collections for**

<table>
<thead>
<tr>
<th>Date Received</th>
<th>RECEIVED FROM</th>
<th>Ledger Page</th>
<th>Fees for Initiation</th>
<th>Fees for Affiliation</th>
<th>Dues</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Brought forward</td>
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</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>RECEIVED FROM</th>
<th>Ledger Page</th>
<th>Fees for Initiation</th>
<th>Fees for Affiliation</th>
<th>Dues</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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</tr>
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</table>

**Lodge No.**

<table>
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<tr>
<th>Lodge No.</th>
<th>B. P. O. Elks</th>
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</tbody>
</table>
NOTICE OF ELECTION

BENEVOLENT AND PROTECTIVE ORDER OF ELKS
A FRATERNAL ORGANIZATION

Dear Applicant:

I have the pleasure to inform you that, at the regular session of __________________________ Lodge, No. ________,
B.P.O. Elks, held on __________________________,
you were elected to membership.

Please present yourself for the purpose of Orientation on the date of __________________________, at __________ p.m.
Spouses and friends are welcome to attend Orientation.

Please present yourself for the purpose of Initiation on the date of __________________________, at __________ p.m.

Respectfully yours,

_________________________________________
Secretary

_________________________________________
Date

Balance Due Prior to Initiation:

Due on Initiation Fee............... $ __________
Dues to April 1 ................. $ __________
Dues to October 1 .............. $ __________
Total............................ $ __________

Section 14.030, B.P.O.E. Statutes: If the candidate fails to appear for Initiation, without good cause within four months from the date of election, the applicant’s right to Initiation shall be forfeited, and the Lodge shall not return any portion of the amount deposited.

561100/561200
Samples of Dues Billing Statements

CLMS — 1st Dues Notice

Lodge Name #5555
PO Box 555
City Name, MN 55350-0272

04/02/2009

John Doe
425 W. Diversey
Chicago, IL 60614

00614-

Dues Statement
April 1, 2009

Annual Regular Member Dues

[Check Applicable Boxes]
1. Elks National Foundation
2. State Major Project
3. Lodge Scholarship Fund

Payment Required $50.00

$10.00 optional

$10.00 optional

$10.00 optional

Amount Due: $50.00

Please return this statement with your payment. Thank you.

donotic

TOTAL AMOUNT ENCLOSED: ___________

---

CLMS — Delinquent Dues Notice

Lodge Name #5555
PO Box 555
City Name, MN 55350-0272

04/02/2009

John Doe
425 W. Diversey
Chicago, IL 60614

00614-

Dues Statement
April 1, 2008 - April 1, 2009

Regular Member Dues - April to April

[Check Applicable Boxes]
1. Elks National Foundation
2. State Major Project
3. Lodge Scholarship Fund

Payment Required $45.00

$10.00 optional

$10.00 optional

$10.00 optional

Amount Due: $45.00

Please return this statement with your payment. Thank you.

donotic2

TOTAL AMOUNT ENCLOSED: ___________

---

Code 560900 — Statement of Dues Pad

Lodge Name #5555
PO Box 555
City Name, MN 55350-0272

04/02/2009

John Doe
425 W. Diversey
Chicago, IL 60614-1889

Lodge Name #5555
PO Box 555
City Name, MN 55350-0272

04/02/2009

John Doe
425 W. Diversey
Chicago, IL 60614

00614-

Dues Statement
April 1, 2009

Annual Dues $___________

Are you receiving The Elks Magazine? ______ Yes ______ No ______

Is the above address correct? ______ Yes ______ No ______

If not correct, PLEASE LIST!

New Address: ____________________________________________

Name: __________________________________________________

Member’s Number: _______________________________________

“Dues are not deductible for Federal Income Tax Purposes. “In accordance with the Laws of the Order, $3.50 of the BPO Elks of the USA Annual Membership Dues is for your annual subscription to The Elks Magazine and is not deductible.”

TOTAL AMOUNT ENCLOSED: ___________

---

CLMS — Remittance Envelopes

Lodge Name #5555
PO Box 555
City Name, MN 55350-0272

John Doe
425 W. Diversey PRKwy
Chicago IL 60614-1889
LODGE TRANSACTIONS REPORT  
[Section 12.050(m)]  
Lodge Secretaries: You may copy this page for your use.

Lodge No. __________ Name __________________________________________

For six month period starting April 1, 20____ to September 30, 20____

<table>
<thead>
<tr>
<th>MEMBERSHIP TRANSACTIONS</th>
<th>DELINQUENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>(Based on yearly Worksheet)</strong></td>
<td>6 months in arrears</td>
</tr>
<tr>
<td>Number of Elks on April 1</td>
<td>1 year in arrears</td>
</tr>
<tr>
<td>Number Initiated</td>
<td>Over 1 year in arrears</td>
</tr>
<tr>
<td>Number Affiliated by Dimit</td>
<td></td>
</tr>
<tr>
<td>Number Reinstated</td>
<td></td>
</tr>
<tr>
<td>Lines 2,3,&amp; 4—Total Added</td>
<td></td>
</tr>
<tr>
<td>Number stricken for nonpayment</td>
<td></td>
</tr>
<tr>
<td>Number Expelled</td>
<td></td>
</tr>
<tr>
<td>Transfers Granted</td>
<td></td>
</tr>
<tr>
<td>Absolute Dimits Granted</td>
<td></td>
</tr>
<tr>
<td>Number Deceased</td>
<td></td>
</tr>
<tr>
<td>Lines 6-10 = Total Dropped</td>
<td></td>
</tr>
<tr>
<td>Total on Sept. 30</td>
<td></td>
</tr>
<tr>
<td>Lines 1 &amp; 5 minus Line 11</td>
<td></td>
</tr>
</tbody>
</table>

DUES
- Collected
- To be collected

PER CAPITA FEES
- GL
- SL
- DISTRICT

Collected
- To be collected

Are By-Laws current? Yes ☐ No ☐

Expiration Date

For six month period starting October 1, 20____ to March 31, 20____

<table>
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<tr>
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DUES
- Collected
- To be collected

PER CAPITA FEES
- GL
- SL
- DISTRICT

Collected
- To be collected

Are By-Laws current? Yes ☐ No ☐

Expiration Date
PROPER FORMS OF ADDRESS

Always consult your current *Grand Lodge & State Associations Directory* for the correct names and addresses when contacting Grand Lodge personnel.

Members of the Order are not referred to as “Mr.,” and we **never use nicknames nor titles** such as “Dr.” In addition, the courtesy title of “Honorable” or “Hon.” for Grand Lodge Officers is no longer used, per the directive of the Future of Elksdom Committee in 2011.

**Samples of correct usage of titles:** All Grand Lodge Officers, such as Grand Exalted Ruler, Grand Esteemed Leading Knight, Grand Secretary, etc., are to be addressed as follows:

(Name), G. E. R.  
B. P. O. Elks  
(then 2-line address)

*(This however, does not apply to the Grand Chaplain nor to the Administrative Assistant to the Grand Exalted Ruler.)*

The Chairman of the **Board of Grand Trustees** is to be addressed as follows:

(Name), Chairman  
Board of Grand Trustees  
B. P. O. Elks  
(then 2-line address)

All remaining members of the **Board of Grand Trustees** are to be addressed as follows:

(Name), Grand Trustee  
B. P. O. Elks  
(then 2-line address)

The Chief Justice of the **Grand Forum** is to be addressed as follows:

(Name), Chief Justice  
Grand Forum, B. P. O. Elks  
(then 2-line address)

All remaining Justices of the **Grand Forum** are to be addressed as follows:

(Name), Justice  
Grand Forum, B. P. O. Elks  
(then 2-line address)

All **P.G.E.R.s** are to be addressed as follows:

(Name), P.G.E.R.  
B. P. O. Elks  
(then 2-line address)

**Grand Lodge Agency Managers or Directors** should be addressed using their correct titles such as:

(Name), Executive Director  
Elks National Home  
(then 2-line address)

All **District Deputy Grand Exalted Rulers** are to be addressed as follows:

(Name), D. D. G. E. R.  
(State) South District  
B. P. O. Elks  
(then 2-line address)

*(Be sure to indicate the District as above.)*

All **Special Deputy Grand Exalted Rulers** are to be addressed as follows:

(Name), S. D. G. E. R.  
B. P. O. Elks  
(then 2-line address)