

# 2021-2022

# District Deputy

# Manual



*Elks* Care — *Elks* Share

**BENEVOLENT AND PROTECTIVE**  
**ORDER OF ELKS**  
United States of America



**District Deputy Grand Exalted Ruler**



**Benevolent and Protective  
Order of Elks of the U.S.A.**

**A Fraternal Organization**

## *Mission Statement*

*To inculcate the principles of Charity, Justice, Brotherly Love and Fidelity; to recognize a belief in God; to promote the welfare and enhance the happiness of its Members; to quicken the spirit of American patriotism; to cultivate good fellowship; to perpetuate itself as a fraternal organization, and to provide for its government, the Benevolent and Protective Order of Elks of the United States of America will serve the people and communities through benevolent programs, demonstrating that Elks Care and Elks Share.*



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**FILE ONLINE AT: <https://www.elks.org/members/dds/ddReports.cfm>**

1. Dates of your official Lodge visits.
2. August/September and March/April Clinic dates, reports and attendance (*fillable file available online*).
3. District Deputy Visitation Report (*within one week, and if requested by Sponsor*).
4. Attendance Report at Grand Lodge Sessions (*Exhibit W*).

**E-MAIL, FAX OR MAIL TO STATE SPONSOR AND GRAND SECRETARY**

1. Lodge Visit Expense Voucher signed and with receipts as needed. (*due after ALL Lodge visits completed*). \*
2. Final Voucher after completion of the April Clinic (*due May 1*). \*

*\* Blank vouchers are available on the last 3 pages of this manual.*

**DISTRICT DEPUTY SHALL FOLLOW UP ON THESE REPORTS**

1. Annual Report — Charity portion (*due May 1*).
2. Financial Reporting System [FRS] (*upload due every 3rd Friday*).
3. Review comments from Grand Lodge Auditing & Accounting Committee and verify annual financial concerns are being addressed.
4. Lodge Information Reporting Status to confirm Local Lodge Directory, PER listing, Statutory Committee Chairpersons and Committee Members are filed by April 1-15 in CLMS2Web. <https://www.elks.org/grandlodge/reports/clmsInfoUpdates.cfm?Recalc=TRUE>
5. District Deputy Duties Check List Form (*due May 15*).
6. Monitor the CLMS2Web Lodge Status Report to ensure membership updates are filed twice a month. Go to <https://www.elks.org/grandlodge/reports> and click on the “CLMS Reports” tab and then “CLMS Status Reports.”
7. Monitor the Local Lodges’ Elks National Foundation contributions monthly.
8. Verify submissions to the Lodge Charity Reports on the 15th and 30th of each month.

## **DUE DATE**

## **LOCAL LODGE CONTESTS & PROGRAMS**

<b>March 15</b>	All-American Lodge Contest “A” (received Grand Lodge-supplied form in July/August. Lodge will file completed form to District Deputy by March 15).
<b>March 31</b>	Per Member contributions to the Elks National Foundation Contest “E” (based on Elks National Foundation records).
<b>March 31</b>	Elks National Foundation Lodge Chairpersons Challenge (new pledge) Contest “F” (based on Elks National Foundation records).
<b>May 1-7</b>	Elks National Youth Week.

## **DUE DATE**

## **LOCAL LODGE AWARDS**

<b>Between January 1 and March 31</b>	Elk of the Year, Officer of the Year and Citizen of the Year (submit selection to Grand Secretary for citation, but <u>not</u> before January 1).
<b>March 31</b>	Grand Exalted Ruler’s Outstanding Service Commendation (submit selection to Area Member of Grand Lodge Fraternal Committee).
<b>March 31</b>	Grand Exalted Ruler’s Exalted Ruler Award (submit selection to Area Member of Grand Lodge Fraternal Committee).
<b>March 31</b>	Grand Exalted Ruler’s Local Lodge Award (submit selection to Area Member of Grand Lodge Fraternal Committee).
<b>March 31</b>	Grand Exalted Ruler’s Local Lodge Award for lapsation rate of 2% or less (automatic entry from Lodge Annual Report).
<b>June 15</b>	Grand Exalted Ruler’s Outstanding Recruitment Member Award Pin (submit completed form to Grand Secretary).

**NOTE: DOCUMENTS** > Microsoft is the standard software for processing files. Documents should be sent in Word or .pdf, spreadsheets should be in excel or .pdf, and pictures/photographs should be in .jpeg. DO NOT send pictures (.jpeg) of documents.

**NOTE: PHOTOGRAPHS** > Grand Lodge provides a photographer to have your picture taken with the newly elected Grand Exalted Ruler on Monday afternoon. Grand Lodge **will not** cover the cost should you decide to purchase any pictures.

DETAILED INFORMATION MAY BE OBTAINED FROM THE GRAND LODGE PROGRAM,  
THE ANNUALLY-ISSUED COMMITTEE BROCHURES/FLYERS, AND THE EXALTED RULERS,  
LODGE OFFICERS AND COMMITTEE MEMBERS MANUAL



## CHECK LIST — DISTRICT DEPUTY DUTIES

(Use this Check List as a month-by-month guide for the year. As you complete these activities, enter the dates on the blank lines.

For further explanation, see the section titled “Preparation” on Page 7.)

### July

- ☐ 1. Contact Predecessor and get permanent DDGER files with background information. Retain copies of all reports and other pertinent documents in files for use during year. \_\_\_\_\_
- ☐ 2. Inform Lodges by letter of your appointment (*Exhibit A, Page 28*), notify about August/September Clinic and propose a visitation date for one of their regular meeting nights between September 1 and December 20. Copy your Sponsoring Past Grand Exalted Ruler(s), Grand Secretary, District Leaders and District Advisors. (Enter date here) \_\_\_\_\_
- ☐ 3. Study all District Deputy materials received. \_\_\_\_\_
- ☐ 4. Complete the DDGER Training Quiz on elks.org and e-mail a copy of the certificate of completion to State Sponsor. \_\_\_\_\_
- ☐ 5. Take the District Deputy Certification Quiz at elks.org. \_\_\_\_\_
- ☐ 6. If needed, create username and password to gain “Members Only” access to the DDGER Section at Elks.Org. \_\_\_\_\_
- ☐ 7. Review FRS Training material at elks.org and when completed, contact frshelp@elks.org and receive your “user name” and “Password” for access to the Financial Reporting System. \_\_\_\_\_
- ☐ 8. Review your Lodges’ regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the “CLMS Reports” tab, then the “CLMS2 Status Reports” link. \_\_\_\_\_
- ☐ 9. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the “Charitable Reports” tab, then the “Pending Charitable Reports” link. \_\_\_\_\_
- ☐ 10. Monitor the Local Lodges’ contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 11. Three (3) required Financial reports from FRS: “00 P&L with Summary,” “01 Balance Sheet,” and “03 Grouped By Department” are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 12. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month. \_\_\_\_\_
- ☐ 13. File the Attendance Report at Grand Lodge Sessions (*Exhibit W*) online at <https://www.elks.org/grandlodge/reports/>, click the “DD Reports” tab, then the “DD Grand Lodge Session Attendance Reports” link upon returning from the convention. \_\_\_\_\_

### August/September

- ☐ 1. Hold first District Deputy Clinic (if necessary, confirm visitation dates at this time). \_\_\_\_\_
- ☐ 2. Promptly write the Sponsoring Past Grand Exalted Ruler(s) a short narrative report on the clinic and include the Attendance Report and Clinic Agenda (*Exhibit B-1 to 3*) and schedule of your official visits. E-mail Grand Secretary a copy of your Clinic Report and schedule of official visits to [ddgerfile@elks.org](mailto:ddgerfile@elks.org). \_\_\_\_\_

- ☐ 3. Record the dates for official visits online at <https://www.elks.org/grandlodge/reports/ddVisitationDates.cfm>. \_\_\_\_\_
- ☐ 4. Review your Lodges' regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the "CLMS Reports" tab, then the "CLMS2 Status Reports" link. \_\_\_\_\_
- ☐ 5. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the "Charitable Reports" tab, then the "Pending Charitable Reports" link. \_\_\_\_\_
- ☐ 6. Monitor the Local Lodges' contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 7. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 8. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_
- ☐ 9. Where applicable, meet with your District Esquire and District Auditor and plan for the Lodge Visitations. \_\_\_\_\_

## September

- ☐ 1. Start Lodge visits. (At least two weeks prior to visit send letter of reminder to each Lodge with a copy to the Sponsoring Past Grand Exalted Ruler(s). State time of arrival and Officers you expect for pre-Lodge Meeting.) (See Exhibit D) \_\_\_\_\_
- ☐ 2. Submit reports of visits no later than one week after each date of visit. (See sample Exhibit G-1 to 5.)
- ☐ 3. Record the date your visitation report is submitted. (Enter date here) \_\_\_\_\_
- ☐ 4. Review your Lodges' regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the "CLMS Reports" tab, then the "CLMS2 Status Reports" link. \_\_\_\_\_
- ☐ 5. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the "Charitable Reports" tab, then the "Pending Charitable Reports" link. \_\_\_\_\_
- ☐ 6. Monitor the Local Lodges' contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 7. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 8. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_

## October

- ☐ 1. Continue Lodge visits, file online report of each visit no later than one week after visit. \_\_\_\_\_
- ☐ 2. Record the date your visitation report is submitted. (Enter date here) \_\_\_\_\_
- ☐ 3. Review your Lodges' regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the "CLMS Reports" tab, then the "CLMS2 Status Reports" link. \_\_\_\_\_
- ☐ 4. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the "Charitable Reports" tab, then the "Pending Charitable Reports" link. \_\_\_\_\_
- ☐ 5. Monitor the Local Lodges' contributions to the Elks National Foundation. \_\_\_\_\_

- ☐ 6. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 7. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_

## November

- ☐ 1. Continue Lodge visits, file online report of each visit no later than one week after visit. \_\_\_\_\_  
(Try to conclude visits this month.)
- ☐ 2. Record the date your visitation report is submitted. (Enter date here) \_\_\_\_\_
- ☐ 3. At the conclusion of ALL of your Lodge visits, compile expenses to date and submit with receipts to Grand Secretary for approval on Expense Reimbursement Vouchers located at back of this book. Mail a **copy** (*please, copy only*) of your voucher to the Sponsoring Past Grand Exalted Ruler(s). \_\_\_\_\_
- ☐ 4. Review membership totals in CLMS2 under the "CLMS Reports" tab. \_\_\_\_\_
- ☐ 5. Review your Lodges' regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the "CLMS Reports" tab, then the "CLMS2 Status Reports" link. \_\_\_\_\_
- ☐ 6. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the "Charitable Reports" tab, then the "Pending Charitable Reports" link. \_\_\_\_\_
- ☐ 7. Monitor the Local Lodges' contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 8. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 9. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_

## December

- ☐ 1. Complete any remaining Lodge visits (Deadline December 20). File report of each visit no later than one week after visit. \_\_\_\_\_
- ☐ 2. Record the date your visitation report is submitted. (Enter date here) \_\_\_\_\_
- ☐ 3. Write letter to Past Grand Exalted Ruler(s) supervising your Area with a copy to your State President, giving details of any community in your District which has the potential for formation of an Elks Lodge.  
\_\_\_\_\_
- ☐ 4. Review your Lodges' regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the "CLMS Reports" tab, then the "CLMS2 Status Reports" link. \_\_\_\_\_
- ☐ 5. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the "Charitable Reports" tab, then the "Pending Charitable Reports" link. \_\_\_\_\_
- ☐ 6. Monitor the Local Lodges' contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 7. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 8. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_

## January

- ☐ 1. Review your Lodges' regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the "CLMS Reports" tab, then the "CLMS2 Status Reports" link. \_\_\_\_\_
- ☐ 2. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the "Charitable Reports" tab, then the "Pending Charitable Reports" link. \_\_\_\_\_
- ☐ 3. Monitor the Local Lodges' contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 4. E-mail reminder notice to Lodges to order membership cards and entry system key cards if used. Membership Card orders can be submitted from October forward. \_\_\_\_\_
- ☐ 5. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 6. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_

## February

- ☐ 1. Special assignments or second visits to Lodges when required by the Past Grand Exalted Ruler(s) of your area. \_\_\_\_\_
- ☐ 2. Review lists submitted by your Lodges of Officers elected for coming year, and request information on action to be taken for any vacant positions or non-reporting Lodges. \_\_\_\_\_
- ☐ 3. Send reminder to each Lodge Secretary and Exalted Ruler-Elect to file the "Statutory Lodge Committee Chairpersons" Form (*Exhibit O-1 to 4*) online at <https://www.elks.org/clms2web/confirmcommittees.cfm> before the March/April Clinic. \_\_\_\_\_
- ☐ 4. General follow-up work. \_\_\_\_\_
- ☐ 5. Verify Lodge Committee Chairpersons Report is filed at <https://www.elks.org/grandlodge/reports/clmsInfoUpdates.cfm>. \_\_\_\_\_
- ☐ 6. Review your Lodges' regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the "CLMS Reports" tab, then the "CLMS2 Status Reports" link. \_\_\_\_\_
- ☐ 7. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the "Charitable Reports" tab, then the "Pending Charitable Reports" link. \_\_\_\_\_
- ☐ 8. Monitor the Local Lodges' contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 9. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 10. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_
- ☐ 11. Inform all Lodges and Sponsoring Past Grand Exalted Ruler(s) of March/April Clinic. \_\_\_\_\_

## March

- ☐ 1. If not filed, contact each Exalted Ruler-Elect for the “Statutory Lodge Committee Chairpersons” Form (*Exhibit O-1 to 4*), for completion and file online. \_\_\_\_\_
- ☐ 2. Review your Lodges’ regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the “CLMS Reports” tab, then the “CLMS2 Status Reports” link. \_\_\_\_\_
- ☐ 3. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the “Charitable Reports” tab, then the “Pending Charitable Reports” link. \_\_\_\_\_
- ☐ 4. Monitor the Local Lodges’ contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 5. Three (3) required Financial reports from FRS: “00 P&L with Summary,” “01 Balance Sheet,” and “03 Grouped By Department” are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 6. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_

## April

- ☐ 1. Use the Lodge Information Reporting Status to verify that all Lodges have completed the CLMS2 filing of Local Lodge Directory Information, PER listing, Statutory Committee Chairpersons and Committee Members by April 15. <https://www.elks.org/grandlodge/reports/clmsInfoUpdates.cfm?Recalc=TRUE>. Follow up with any tardy Lodges to ensure that all are in by April 15 at the latest. \_\_\_\_\_
- ☐ 2. Review “Statutory Lodge Committee Chairpersons” Forms (*Exhibit O-1 to 4*) online at <https://www.elks.org/grandlodge/reports/clmsInfoUpdates.cfm> for errors or omissions. \_\_\_\_\_
- ☐ 3. Hold final District Deputy Clinic, which should highlight and emphasize the new Grand Lodge Program. \_\_\_\_\_
- ☐ 4. Promptly write the Sponsoring Past Grand Exalted Ruler(s) a narrative of the clinic together with a brief appraisal of each Lodge’s accomplishments and prospects for the coming year. Include the Attendance Report and Clinic Agenda (*Exhibit B-1 to 3*). (E-mail copy to Grand Secretary at [ddgerfile@elks.org](mailto:ddgerfile@elks.org)) \_\_\_\_\_
- ☐ 5. Review “Annual Report” forms, Pages 1 and 2, via CLMS2Web. If not filed by April 20, follow up with Lodge. \$100.00 fine for delinquent reports after May 1. \_\_\_\_\_
- ☐ 6. Record the date of filing of Annual Report. (Enter date here) \_\_\_\_\_
- ☐ 7. Compile expenses to date and submit with receipts to the Grand Secretary for approval on expenses reimbursement vouchers located at back of this book. Mail a copy of only your voucher to the Sponsoring Past Grand Exalted Ruler(s). \_\_\_\_\_
- ☐ 8. Review your Lodges’ regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the “CLMS Reports” tab, then the “CLMS2 Status Reports” link. \_\_\_\_\_
- ☐ 9. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the “Charitable Reports” tab, then the “Pending Charitable Reports” link. \_\_\_\_\_
- ☐ 10. Monitor the Local Lodges’ contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 11. Three (3) required Financial reports from FRS: “00 P&L with Summary,” “01 Balance Sheet,” and “03 Grouped By Department” are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 12. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_

## May

- ☐ 1. Verify that your Lodges have submitted the March 31st year-end closing report to FRS. \_\_\_\_\_
- ☐ 2. On May 1, copy these Check List Pages 1, 2, 3, 4 and 5, and mail to both your Sponsoring Past Grand Exalted Ruler(s) and the Grand Secretary. Check status of CLMS and Charitable Reports on Elks.Org Web site.  
\_\_\_\_\_
- ☐ 3. Review your Lodges' regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the "CLMS Reports" tab, then the "CLMS2 Status Reports" link. \_\_\_\_\_
- ☐ 4. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the "Charitable Reports" tab, then the "Pending Charitable Reports" link. \_\_\_\_\_
- ☐ 5. Monitor the Local Lodges' contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 6. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 7. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_

## June

- ☐ 1. Organize and deliver Lodge and District files to your successor on or before June 30, sharing the benefit of your knowledge and experience as District Deputy. Before transfer of files, purge them of all extraneous or unimportant material, such as copies of letters or invitations and replies, etc. \_\_\_\_\_
- ☐ 2. Review your Lodges' regular use of CLMS2Web. Logon to <https://www.elks.org/grandlodge/reports/>, click the "CLMS Reports" tab, then the "CLMS2 Status Reports" link. \_\_\_\_\_
- ☐ 3. Check status of Charitable Reports at <https://www.elks.org/grandlodge/reports/> by clicking on the "Charitable Reports" tab, then the "Pending Charitable Reports" link. \_\_\_\_\_
- ☐ 4. Monitor the Local Lodges' contributions to the Elks National Foundation. \_\_\_\_\_
- ☐ 5. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month. \_\_\_\_\_
- ☐ 6. Verify that your Lodges have uploaded to the Financial Reporting System [FRS] by the 3rd Friday of every month and that any Grand Lodge Auditing and Accounting Committee comments from the Lodge Financial Evaluation Reports are addressed. \_\_\_\_\_

## THE DISTRICT DEPUTY

***Congratulations*** on your appointment as District Deputy! You've served Elksdom well and have the ability to properly discharge the responsibilities of this important office.

You are the personal representative of the Grand Exalted Ruler and hold a key role as the liaison between the Lodges of the District and the Grand Lodge. Local Lodges are responsible to the Grand Exalted Ruler through the District Deputy and the Sponsoring Past Grand Exalted Ruler(s) [PGER]. They should first consult the District Deputy about any problems or questions concerning the Lodge. If satisfaction is not received, the Sponsoring PGER(s) should be consulted. It is your responsibility to visit all the Lodges in your District, ensure that they are operating in accordance with the Laws of the Order, adhering to the prescribed Grand Lodge procedures, and render assistance when needed. The way you perform your duties will have a great impact on the success of the Grand Exalted Ruler's program. It will be helpful for you to know more about the person you represent, therefore we urge you to familiarize yourself with the Biography of the Grand Exalted Ruler as presented to you.

### PREPARATION

Your first obligation is to learn how to properly perform your duties. Carefully study the Grand Lodge programs and goals. Familiarize yourself with the Constitution and Statutes, manuals and Report Forms — all tools of your trade. Also study carefully the Opinions in the Statutes Annotated. Much of the material may also be obtained online at <http://www.elks.org/members/dds/>.

#### ***List of Material Supplied to All District Deputies:***

***\*(SEE EXHIBITS IN THIS BOOK)***

- Grand Lodge Program                      •Charity Records Workbook
- Local Lodge Directory                    •Sample Candidate Booklet

#### **FORMS:**

- \*Work and Follow-Up Sheet (*Exhibit I*)
- \*Clinic Attendance Report Form (*Exhibit B-1*)
- \*DDGER's Auditor Review Guide (*Exhibit E-1 to E-3*)
- \*Online Visitation Report (*Exhibit G-1 to G-5*)
- \*Check List for required Lodge Items (*Exhibit F*)
- \*Conflict of Interest; Ethical Standards; Confidentiality Agreements (*Exhibits T-1 to T-3*)
- \*Expense Vouchers, (*located at back of this book*)

#### **You Will Receive Later in the Year:**

- Stationery
- G/L Proceedings, including Annual Reports of:
  - Memorial & Publication Commission
  - Elks National Foundation
  - Elks National Veterans Service Commission
- Statutes Annotated
- G/L Directory (with State Associations)
- \*Statutory Lodge Committees Form (Feb.) (*Exhibit O-1 to 4*)

At the beginning of this District Deputy Manual is a monthly Check List of your more important duties. It is VERY IMPORTANT that you use the Check List as a month-by-month guide for the year. As you complete these activities, enter the dates in the blank lines. **The District Deputy is expected to follow up with each Lodge if reports are not filed promptly.** If the DD does not get the DDGER copy of any required report on time, the Lodge is delinquent in filing, and you should insist that the deficiency be corrected immediately. On May 1, submit copies of Check List (*Pages 1, 2, 3, 4 and 5*) to both your Sponsoring Past Grand Exalted Ruler(s) and Grand Secretary.

As District Deputy, you will enjoy a position of great honor, prestige and responsibility. Prepare for this important trust by diligent study and planning for the position.

### PLAN YOUR WORK — THEN WORK YOUR PLAN

#### PAST GRAND EXALTED RULERS

Your relationship with your Sponsoring Past Grand Exalted Ruler is VERY important! He serves our Order as adviser and supervisor in the Area assigned him. Both protocol and good business require that he be consulted on all matters affecting that Area. The PGER is more intimately aware of problems and personnel in the Area, and he has more Grand Lodge experience than any other official. In appointing District Deputies, for example, the Grand Exalted Ruler accepts the recommendations of the PGER of the Area who has current knowledge of the people and practices there. Thus, you must keep your Sponsoring PGER informed always of the progress or problems of your district.

You should not communicate directly with the Grand Exalted Ruler without first going through your Sponsoring Past Grand Exalted Ruler(s), for in most cases the matter would be referred back to the Sponsor(s).

If you feel a letter to Grand Lodge is necessary, you should consult your Sponsoring PGER(s) about your problem or idea. Your Sponsor's door is always open. If any of your Lodges are contacted regarding copyright laws involving music, musicians or ASCAP-BMI-SESAC contract agreements, discuss this at once with your Sponsor. On Page 23 is a brief explanation of our Order's position on this matter. Similarly, your Sponsor should be notified if Lodge Bingo operations attract the attention of government agencies, also on Page 24. Incorporation proceedings, real estate and large financial transactions are all important matters of a Lodge, so when these types of activities are being planned, refer to Page 24 and the appropriate Statutes, and keep your Sponsor informed during all phases of the procedure.

In no way is the solving of local problems by your Sponsor and you meant to deprive the Grand Exalted Ruler of information; instead it is the same good business sense that departments in a large corporation follow when they handle minor concerns rather than refer every matter to the Chief Executive Officer.

While the Past Grand Exalted Ruler doesn't want to be bothered with every technicality and minor problem, it's always easier to prevent a mistake than to correct one. Keep in close touch with your Sponsor(s).

## GRAND LODGE SESSION ATTENDANCE

Your Sponsoring Past Grand Exalted Ruler(s) has recommended you for appointment as District Deputy Grand Exalted Ruler. You are required to attend the forthcoming Grand Lodge Session. For your room reservation, make arrangements with your State Association's Housing Coordinator as soon as possible.

### **You are required to bring this District Deputy Manual to the Orientation Session at Grand Lodge and to your Orientation with your Sponsor(s).**

When you arrive at the Convention, be sure to register as a "District Deputy-Designate" at the Grand Lodge Credentials (Registration) desk. You may pick up your spouse's identification credential (badge) at the same time. You are strongly urged to visit all the exhibit booths.

Grand Lodge convenes on Sunday afternoon with the first Business Session beginning at 8 a.m. Monday and continuing each morning through Wednesday. At the Wednesday morning session, our new Grand Exalted Ruler will administer your Oath of Office as District Deputy. You are required to wear a white tuxedo coat (summer formal) for this occasion. Your attendance at the Opening Session and all Business Sessions is required.

You are required to attend the District Deputy Orientation Seminar. At the conclusion of the seminar, your official photograph with the Grand Exalted Ruler-elect will be taken. Check the convention program for the time, day and place for the photos and seminar. The Grand Secretary also will notify you where to be and when.

The District Deputy is required to record attendance of his/her District's Lodge Representatives at Grand Lodge Sessions. This Attendance Report (*Exhibit W*) shall be sent to the Sponsoring Past Grand Exalted Ruler(s) and others as designated.

### **Following is the Grand Lodge Convention Expense Policy, which applies to District Deputies-Designate:**

**I.** Grand Lodge will purchase and provide the round-trip AIRPLANE TICKETS from its officially contracted travel agency for you and your spouse (or significant other when approved by the State Sponsor). If, after booking of your flight schedule you wish to make a change, be advised these changes will be at your expense, unless the change was at the request of Grand Lodge. All airline tickets must be purchased through the Elks National Convention office or the online Axiom website. **YOU CAN SECURE AIRLINE TICKETS IN ONE OF TWO WAYS:**

**(a)** To have the Elks National Convention office book your airline tickets for you, please complete the enclosed form in its entirety; check "NO" in the box on the form that asks if you will be using the online program "Axiom" and fax/e-mail the form to the Elks National Convention office and wait for our travel provider to advise you of the available flight schedules and book the tickets for you.

**(b)** To book your airline reservations via the Elks online program "**a2b**", provided by American Travel Solutions. Complete the travel form in its entirety, check "YES" in the box on the form that asks if you will be using the online program "a2b" and fax/e-mail the form on to the Elks National Convention office. You will then receive an e-mail with instructions on how to use the online site as well as your own individual username and password to the a2b program within 2 business days. **PLEASE BE SURE TO READ INSTRUCTIONS PRIOR TO ACCESSING THE PROGRAM.**

**NOTE: The "a2b" by AmTrav will NOT require a credit card number of you or your spouse; your flights will be billed to the Elks directly.**

2. If you plan to **DRIVE**, Grand Lodge will reimburse you at 30¢ per mile, up to the cost of airfare, whichever is least costly. The travel per diem will prevail as listed below. Onsite convention parking will be reimbursed up to \$20.00 per authorized number of days in attendance. There will be no other expense reimbursement if you chose to drive.
3. You are authorized to arrive on the Saturday preceding the start of the annual Grand Lodge Session, and to depart Wednesday afternoon *AFTER* the Grand Lodge Session ends. Grand Lodge will prepay your HOTEL for the FOUR NIGHTS authorized for your stay; if you wish to arrive earlier and/or stay longer, the extra days will be at your expense.
4. Your Convention housing reservations must be *made only through your State Association's Housing Coordinator*. No room deposit is needed for reservations. Some states' packages may require a deposit for functions held by the state.
5. You will receive \$25 for each of the TWO TRAVEL DAYS to cover cab fare from and to the convention site airport and your hotel. Any amount more than that is at your expense.
6. You will receive \$100 PER DIEM for the FOUR DAYS of authorized attendance (Sunday to Wednesday).
7. The Grand Lodge registration fee does not qualify for reimbursement.
8. Purchase and distribution of the official photograph with the Grand Exalted Ruler-elect will not be reimbursed.

**NOTE: PHOTOGRAPHS** > Grand Lodge provides a photographer to have your picture taken with the newly elected Grand Exalted Ruler on Monday afternoon. Grand Lodge **will not** cover the cost should you decide to purchase any pictures.



9. Two checked bags per person are allowed. Any fees charged for oversize or overweight luggage will not be reimbursed.
10. Mileage to and from the home airport, and airport parking expense for up to five days, may be claimed for reimbursement.

## DISTRICT DEPUTY CONFERENCE

After you return home, you should confer with your predecessor AS SOON AS POSSIBLE to learn about the condition of the Lodges now under *your* jurisdiction. Your predecessor will point out the Lodges' many achievements and advise you of their *weaknesses*. Also, meeting with all of your Area Past District Deputies can be productive.

Your predecessor should hand you a complete file on each Lodge by June 30, as required by Grand Lodge. The file should contain: a 10-year membership statistical record; financial statements and financial evaluation report of the preceding year (in some cases for two-four years, particularly if the Lodge has been having consistent financial problems); copies of Membership statistical reports and annual reports; copies of By-Law approvals and any legal opinions and decisions handed down; and copies of all previous District Deputy reports, as far back as possible.

## STATIONERY AND CORRESPONDENCE

**NOTE: DOCUMENTS** > Microsoft is the standard software for processing files. Documents should be sent in Word or .pdf, spreadsheets should be in excel or .pdf, and pictures/photographs should be in .jpeg. **DO NOT** send pictures (.jpeg) of documents.

You will be furnished with blank letterhead and envelopes. After the Grand Lodge Convention, the Grand Secretary will e-mail templates for you to input your personal information. Please, do not waste stationery by using letterhead for second sheets, "cc" list distribution and/or file copies. If additional letterhead or envelopes are needed, contact the Grand Secretary. Confirm your mailing list with your Sponsor(s). **ALWAYS REMEMBER, ANSWER ALL CORRESPONDENCE PROMPTLY.**

## VOUCHERS

### Expenses for Official Lodge Visitations and Clinics:

You may be reimbursed by Grand Lodge for:

- (a) Travel and auto at the mileage rate set by the Board of Grand Trustees.
- (b) If the distance makes it necessary, reimbursement – when approved by the State Sponsor – will be made for actual meals and/or hotel expenses (**unless paid for by the Lodge**). However, receipts must accompany expense voucher.
- (c) Office supplies, postage and telephone.

Please do not claim expenses for each visitation. In November and April, compile expenses to date and submit with receipts to the Grand Secretary for approval of expense reimbursement vouchers published in the back of this book. Submit your FINAL voucher by May 1 to the Grand Secretary.

### Please Note:

- (a) Expenses are allowed for only one official visit (previsits not reimbursed) to each Lodge in your District, except for your home Lodge for which no reimbursement is allowed. If followup visits are required, the Sponsor must authorize any reimbursement.
- (b) For your visitations and clinics only, your own travel expenses are allowed as outlined above. No allowance is made for those who accompany you.
- (c) Your expenses for travel, food and hotel are not reimbursed for attending State or District meetings, social functions, Officer installations, Ritualistic Contests, Elks Training Seminars, etc. You will not be reimbursed for expenditures incurred for Grand Exalted Ruler visitations.
- (d) Expenditures will not be reimbursed for, nor limited to, staff badges, office machines (i.e. computer, printer, scanner, shredder, etc.) typewriter rental, stenographic services, tuxedo rental, apparel cleaning or floral tributes. Also not subject to reimbursement is printing of directories, manuals and pamphlets available through Elks Districts, State Associations or Grand Lodge. For any additional purchases, request approval from the Grand Secretary *before* making the purchase. Once approved, submit a brief explanation of the extra purchases, along with the District Deputy Expense Voucher, to the Grand Secretary and your State Sponsor.

## BUSINESS CARDS

No provision is made for reimbursement for business cards, visitation schedules or other items of your choosing. They will be at your own expense.

## LETTER NOTIFICATION TO LODGES

Now that you have taken the oath of office, you are officially the District Deputy Grand Exalted Ruler for your district. You should immediately send a letter of notification (*Exhibit A*) to all Lodges in your district. Don't wait for your official stationery . . . get the letter out at once on your personal or Lodge stationery. Inform them of your appointment — give them your name, your home and business addresses and telephone numbers. Assure them of your desire to be helpful with any problem. Ask each Lodge to put your name on its mailing or e-mail list for Lodge bulletins and announcements.

With this letter, include your biography to acquaint you with Lodge Members. Lodges should publicize your official visit in their bulletins and local newspapers. It is suggested that your picture, if available, AND business card be posted on Lodge bulletin boards. Your name, address and telephone numbers also should be published in each Lodge bulletin to enable ANY Elk in the District to contact you if needed.

***In that first letter, be sure to put the time, place and date of your first clinic or workshop.*** Emphasize that the Exalted Ruler, Leading Knight, Secretary, Chairperson of the Board of Trustees and Chairperson of the Board of Directors of Incorporated Lodge (if applicable) of each Lodge are *required* under the Laws of the Order to attend all clinics. E-mail, mail or fax a copy to your Sponsoring Past Grand Exalted Ruler(s). Also, suggest that the Chairpersons of club management and Auditing and Accounting Committee, club managers, and other Officers and Committeepersons, attend the clinic.

Finally, be sure to include tentative dates of your official visits, for confirmation at the *first* clinic. Make every effort to schedule your first visits to Lodges, which you consider weak and in need of early help. But IN NO CASE should your visits start before September 1. Let each Lodge know that one purpose of your early notification letter is to ensure that financial records will be available at the Lodge for your inspection when you visit. Each Lodge is also urged to use the extra time to begin processing an applicant for initiation that night.

## **DISTRICT DEPUTY APPOINTEES**

In many states, District Deputies appoint an “Esquire for the District Deputy” to assist in examining Lodge facilities and non-financial procedures. Also, because so few District Deputies are qualified to examine Lodge financial records, you might also consider appointing an “Auditor for the District Deputy.” Both positions are *entirely unofficial* and voluntary, and no statutory provision is made for paying their expenses. Where they are used, District Deputies have no difficulty securing qualified Members to serve in those positions. But if a District Deputy uses an Esquire and an Auditor, they are *not allowed* to make recommendations directly to Lodge Officers; all recommendations must be made through the District Deputy.

To properly perform their functions during Lodge visits, each should be provided with a checklist of all Lodge areas for evaluation. If no standard form has been given to you, contact your Sponsoring Past Grand Exalted Ruler(s) for samples or suggestions.

If you decide to use either of these unofficial Officers, your notification letters to Lodges should include their names.

## **ESQUIRE TO THE DISTRICT DEPUTY**

The Esquire selection must be reviewed and approved by the State Sponsor.

The Esquire selected by the District Deputy assists in examining the facilities and non-financial procedures of each Lodge in the District. There is no statutory provision for paying the Esquire’s expenses.

In examining the Lodge, the Esquire might use a checklist centering on cleanliness, safety, attractiveness and efficiency. The checklist should be returned to the District Deputy upon completion. (Grand Lodge does not supply these checklists, because their contents vary from state to state.) Obtain your District’s latest version from your predecessor, or add any non-safety-related items desired to the basic SELF INSPECTION Checksheet (*Exhibit K*) sent annually to all Lodges. It is also published in the Grand Lodge Accident/Claim Prevention Manual.

The Esquire may also: arrange with the Exalted Ruler or the ER’s representative to properly introduce the District Deputy; arrange for the District Deputy to change to formal dress for the meeting; see that club rooms are closed during all meetings, per Section 16.090, Laws of the Order; and see that the Exalted Ruler starts the meeting on time and that no speeches other than the District Deputy’s are scheduled.

In addition, the Esquire should emphasize to the Exalted Ruler that the District Deputy wishes to be called upon to speak soon after the initiation and that the meeting should be brief. Save the nonessential business, speeches, balloting, reading long lists of applicants and controversial business for other meetings.

## **AUDITOR TO THE DISTRICT DEPUTY**

The Auditor selection must be reviewed and approved by the State Sponsor.

The DD appointee to this unofficial and voluntary position assists in auditing the finances of each Lodge in the District. No statutory provision is made for paying his or her expenses.

Duties of the auditor are included in the “Guide for Review by DDGER’s Auditor” (*Exhibit E*). They may consist of: examining the books of the Lodge and club, making sure they are current, complete and readily available; that a budget has been adopted and is being followed; that the statutorily required audits have been performed by the Lodge Auditing & Accounting Committee; and that all Members who handle funds are adequately bonded. A trained auditor can also assess whether the Lodge and club are profitable; whether changes are needed to stem financial losses; whether membership records are properly kept; whether work sheets, membership control charts and Charity Records Workbook are current; and whether the file of expulsions, suspensions and rejections is complete.

The Chairperson of the Lodge Auditing & Accounting Committee should be present during the inspection.

Provide a copy of the Lodge Financial Evaluation Report to the auditor.

The auditor may make recommendations on findings, but only to the District Deputy, who may choose to ask the auditor to discuss the suggestions with Lodge and club officials.

## **ENSURING LODGES MAINTAIN HIGHEST ETHICAL STANDARDS**

District Deputies have been asked to ensure that Local Lodges are aware of the need to avoid conflicts of interests and to maintain the highest standards of business ethics and confidentiality. The sample Conflict of Interest, Ethical Standards and Confidentiality Agreements (*Exhibit T-1 to T-3*) provides some general points for Lodges to consider in meeting acceptable standards. Note that Exhibit T is generic in character and should be reviewed by local legal counsel for compliance with state and federal requirements.

## **CERTIFICATE OF SUSPENSION AGAINST AN OFFICER OR MEMBER**

Pursuant to Grand Lodge Statutes Section 8.180, when a complaint is filed against an Officer or a Member of the Local Forum, he or she shall be suspended from duty if the District Deputy Grand Exalted Ruler of the District in which the Lodge is located files a certificate with the Secretary of that Lodge that, in the DDGER's opinion, there is reasonable cause for the complaint. (*Exhibit U*) You shall not file a certificate without first receiving approval of your State Sponsor or other supervisory official (Special Deputy Grand Exalted Ruler or District Leader.)

## **JUDICIARY**

Judicial opinions are rendered only by the Grand Lodge Committee on Judiciary! But while you are neither qualified nor permitted to make legal interpretations, you are trusted to report suspected statutory violations in your District. In addition, urge Lodge Officers to read the opinions published in the Statutes Annotated, which address many questions, thus eliminating unnecessary inquiries to the Judiciary Committee. But for thorny issues, educate your Lodges that contact information for their Area Member of the Committee on Judiciary can be found in the annual Grand Lodge and State Associations Directory (Code 553800). Note that many Lodges mistakenly contact the National Headquarters in Chicago for Judiciary opinions or instructions, only to learn that they must contact their Area Judiciary Member.

## **CLINICS — GENERAL**

Grand Lodge requires that you hold two clinics or workshops during your year. Each has a specific purpose and you should emphasize these purposes (*Clinic Agenda — Exhibit B-2 & 3*).

Emphasize that the Exalted Ruler, Leading Knight, Secretary, Chairperson of the Board of Trustees (if the Lodge is not

incorporated) or Chairperson of the Board of Directors if the Lodge is incorporated, if applicable, *must* attend these clinics ... and that other Officers, Committee Members, Trustees (especially the Accident Prevention Manager), and club managers are also urged to attend. Record attendance at each clinic (*Exhibit B-1*), and if the required Officers are not present, demand an explanation. If absences are flagrant, ask your Past Grand Exalted Ruler to write and demand an explanation.

## **AUGUST/SEPTEMBER CLINIC**

Your first clinic should be held in August (or September with PGER approval) to review with Lodge Officers the special emphasis the Grand Exalted Ruler wants placed on specific portions of the Grand Lodge Program, and to evaluate how the program has been implemented since the previous April clinic. Plan the meeting carefully and work on a prepared agenda (*see Exhibit B-2 & 3*). Many times, social meetings are combined with these conferences and, while Grand Lodge doesn't object to this, the *work* of the clinic *must not be slighted* in favor of social events.

On the Elks.Org website, Grand Lodge provides many management tools for Local Lodges, including the Statutes, Guide By-Laws and a variety of program manuals. The manuals contain information based on successful programs conducted by other Lodges as well as input from professional sources, all at a fraction of the cost any Lodge would have to expend to learn the same lessons by trial-and-error or hiring its own consultants. Discuss your manuals at all clinics, especially your first clinic, and stress the justified displeasure Grand Lodge would show toward any Lodge whose program is weak or nonexistent in a required area as a result of Officers who do not consult (or even possess) these manuals. Point out that you must see ALL the current Grand Lodge Manuals on your official visit, and that not having them is an admission of negligence in view of your clinic displays.

Confirm the dates of your official visits at this clinic. **You are required to complete all your visits by December 20**, preferably earlier. Ask the Lodges to please cooperate with your visit schedule . . . but in cases of severe conflict, you should be willing to adjust your schedule if possible.

Please note that, unlike in past years, the District Deputy is no longer required to witness and grade the Initiatory Ritual at the official Lodge visit. That requirement, which had been mandated under Section 4.490 of the Grand Lodge Statutes, was repealed at the 2011 Grand Lodge Session.

Advise the Lodge of your approximate arrival time and that you want to meet first with the Exalted Ruler, Secretary, Chairperson of the Board of Trustees, Chairperson of the club management body and Chairperson of Auditing and Accounting Committee . . . to be joined later by other Officers and Chairpersons of important committees.

Please send a copy of Exhibit C with your letter of notification for the official Lodge visit. This is information the Lodge Secretary should have available for the District Deputy visit. These various checklists and reports verify that the Lodge's basic internal systems and supplies are functional, but you must also determine each Lodge's participation in the community service toward which all this preparation is directed. You should require each important Lodge committee to supply you with a concise, written report. You should get these from the Fraternal, National Foundation, Activities and Veterans Service Committees, etc. Give special attention to the new Charity Records Workbook, and use the topic to emphasize the value of Elkdom in each community is determined by its contributions to bettering the lives for all citizens. Also point out that on your visit you will review the Lodge's charity records to verify that the Lodge is both active in these areas AND that their records are correct and up-to-date.

Explain the procedures to be followed in your visits to the Lodges, as detailed in the following section on Visitation regarding your entrance, introduction, Lodge activity and social conduct, and your message to the Members.

Stress that *ALL* club and social activities must cease during Lodge meetings, as provided by Sec. 16.090, Laws of the Order, not only for your official visit but for *all* official Lodge meetings. If the Order's laws are violated, Grand Lodge will take action against those responsible. You should also insist that good decorum be maintained at all Lodge meetings and in the clubrooms. Emphasize the prohibition against gambling, improper language, indecent stories and questionable entertainment. The Exalted Ruler, assisted by the Officers and club management, is required to supervise these things and stop any violations at once! This requires courage, but it IS important. Bad publicity could cause the Grand Lodge to suspend club activities and, if serious enough, could cause loss of the Lodge's charter!

Strongly inform all of your District's Exalted Rulers that severe consequences will befall any Lodge that omits ***a required Lodge meeting*** UNLESS first receiving permission from you (Sec. 15.070, Laws of the Order). This requirement applies especially to Statutorily-mandated services such as Memorial Sunday and Flag Day (Sec. 2.020 and 2.030, Laws of the Order).

Emphasize that the Exalted Ruler is the Chief Executive Officer who is responsible for the *social* conduct of Lodge Officers and Lodge functions, and also for the successful operation of the Lodge, proper functioning of important committees and attaining objectives.

Review with Lodge Secretaries Section 14.180, Laws of the Order, and impress upon them that a Certificate of Release must be issued upon the payment of \$20. Many mistakenly insist on payment of back dues. Remind them also that Absolute Dimits, Certificates of Release and Transfer Dimits must be

issued promptly on request (no voting at meeting required) to avoid unnecessary correspondence or delay. For waivers of jurisdiction, first refer to the Lodge of jurisdiction.

Alert Officers to the Grand Lodge Area system with respect to Committee assignments. Make sure that each has the correct name and address of the Past Grand Exalted Ruler Sponsor(s) having jurisdiction over your state.

At this point, the clinic may be broken up into groups for discussions led by pre-selected Past District Deputies or others qualified in specific fields. The groups should end their discussions in about one hour, with everyone returning to the general conference for questions and answers.

Right after your clinic, send the dates of your official visits to the Grand Secretary and your Sponsoring Past Grand Exalted Ruler(s). If you need to reschedule an official visit, remember to notify those involved. You should also send to your Sponsoring Past Grand Exalted Ruler(s) a short report on the clinic, clinic agenda and Attendance Report (*Exhibit B-1 to B-3*).

At all clinics — and especially on official visits — remember that you are the personal representative of the Grand Exalted Ruler! Your appearance and conduct not only reflect on him and the Order, they also set the standard for the Members of your district. The Lodge's reputation in the community must reflect decency and respect, as exemplified by you.

## VISITATION TO LODGE

About two weeks before an official Lodge visit, send a reminder letter (*Exhibit D*) and a copy of (*Exhibit C*) to the Lodge and only a copy of (*Exhibit D*) to your Sponsoring Past Grand Exalted Ruler(s) with the date and time of your arrival and the Officers you expect to be present when you begin your examination. Allow sufficient time to make a businesslike, thorough examination. You should arrive no later than 4:00 P.M.

If you have appointed a DDGER's Esquire and Auditor, they should accompany you and, upon arrival, commence with their duties using appropriate checksheets. The Lodge Trustee designated as the Accident Prevention Manager should be available to accompany the DDGER's Esquire in examining the Lodge premises, and also should provide the District Deputy with copies of the latest Self-Inspection Reports (*Exhibit K*).

## DISTRICT DEPUTY OFFICIAL VISIT REPORT

During your pre-Lodge meeting with the Officers and Chairperson of club management, complete all information required in the District Deputy's official report. (The Lodge will have already completed *Exhibit C*, but you must check it for accuracy). Throughout your examination, be prompt, friendly, businesslike and brief. If you use a DDGER Esquire and DDGER Auditor, remember that they take instructions from you and report **ONLY** to you.

The Visitation Report (*Exhibit G*) is now submitted online and can be accessed by District Deputies at <http://www.elks.org/members/ddvisits.cfm>. Instructions for submitting reports online via [elks.org](http://www.elks.org), are *Exhibit H*. If you have questions about the electronic form, write to [webmaster@elks.org](mailto:webmaster@elks.org).

The Laws of our Order mandate that every Lodge make a general revision of its By-Laws at least once every five years, regardless of the quantity of individual amendments approved since the Lodge's last general revision approval date, and have them approved by the Grand Lodge Committee on Judiciary. Fill in this date on your report from either the printed By-Laws or the official notice from Judiciary of a GENERAL REVISION Approval — NOT the date of an individual By-Laws Amendment. Do not accept a verbal statement. If a Lodge is near or past the five-year limit, it may submit its By-laws revision online at <http://www.elks.org/grandlodge/bylaws>. If you cannot determine the date of the Lodge's last General Revision, contact the Grand Secretary for this information. (A copy of the revision instructions appears as *Exhibit L*.)

Upon your District Deputy visit, you shall meet with the membership management team to discuss the Lodge's membership program. Please complete Question 4W in the District Deputy Visitation Report (*Exhibit G-3*) by providing a concise report of the Lodge's membership control program. Providing the Lodge with a membership analysis (*Exhibit M*) would be advisable. The membership figures may be obtained from the Grand Lodge Annual Reports and the CLMS2Web. The membership analysis should also include Lodge compliance with Section 12.050(m), requiring the compilation of the Lodge Transaction Reports in April and October (*Exhibit S*).

When you've finished examining the Lodge, it's helpful to meet with the Officers to summarize your findings and offer constructive ideas and criticism. *This* is the proper time to discuss administrative weaknesses and problems. Sometimes, much is accomplished by meeting later with specific Officers.

## **REVIEW OF INTERNAL FINANCIALS AND OTHER INFORMATION**

The District Deputy, assisted by a DDGER Auditor, is required to conduct a review of internal financials and other information upon the District Deputy official visit to the Lodge. A "Guide for Review by DDGER Auditor" is provided (*Exhibit E*).

Keeping the Lodge and Club on an even financial keel is increasingly difficult, hence it must have *close and continuous attention*. This requires adequate accounting procedures. Good business practices call for those responsible for managing the Lodge and club to be supplied with prompt and accurate financial reports. If your examination discloses that the accounting system is antiquated or inadequate, discuss with the Officers, Trustees and Lodge Auditing and Accounting Committee

recommendations for updating the Lodge accounting system with a software based accounting program (QuickBooks Desktop is recommended). Call attention to the Grand Lodge Auditing and Accounting Manual (Code 510100) and suggest that the Lodge submit the Manual, supporting FRS reports and Grand Lodge Auditing & Accounting Committee Evaluation Form (*Exhibit X*) to an accountant who can adapt the suggestions into the Lodge's accounting system. If the problem is caused by faulty operation of the club, etc., strongly urge that the Lodge ask its State Business Practices Committee and State Sponsor for an analysis and remedial recommendations.

## **LODGE FINANCIAL EVALUATION REPORT**

If the Lodge's financial evaluation report has been completed by Grand Lodge Auditing and Accounting Committee, it will be e-mailed to you. It should be reviewed with Lodge Officers, Board of Directors/Trustees, Lodge Auditing and Accounting Committee and the Chairperson of Club Management.

You should ask the reason for every "NO" answer or each comment left unanswered, and enter the Lodge's responses into your report. Excessive bar and food service percentage cost of goods sold shall be discussed. A decrease in working capital of the Lodge and all other fund revenue losses shall be determined and entered into your report. If the Lodge has been late in submitting its March 31st year end FRS data, a more intensive financial examination on your visit is clearly called for.

The duty of the Exalted Ruler, as Chief Executive Officer of the Lodge, assisted by the Lodge Auditing and Accounting Committee, is to ensure that all recommendations are considered and implemented when approved.

## **LODGE AUDITING AND ACCOUNTING COMMITTEE**

The Lodge Auditing and Accounting Committee, in July, October, and January, is required to review the financial records of the Lodge and club for the year-to-date, including compliance with the approved budget and report at the last regular meeting of the Lodge during those months. A "Guide for Review by Lodge Auditing and Accounting Committee" is provided (*Exhibit J*), and every Lodge's Auditing and Accounting Committee should study the guidelines and useful information supplied by Grand Lodge in the Auditing and Accounting Manual (Code 510100).

Copies of their reports should be given to the District Deputy during the official visitation, and the Auditing and Accounting Committee should be in attendance when the Auditor to the District Deputy is performing the review of internal financial and other information of the Lodge.

## ENTRANCE AND INTRODUCTION

Emphasize that you wish to be brought into the Lodge room as soon as the Lodge is called to order. If other guests are there, you should be the *last* guest introduced. The audience shouldn't be tired out by many separate introductions. Many times, visitors may be asked to take specific seats at the opening of the Lodge, with the Exalted Ruler acknowledging their presence under "Good of the Order."

The Lodge Esquire will enter the Lodge room with the District Deputy, followed by the DDGER's Esquire (if used). The Lodge Esquire will introduce the DDGER's Esquire, and then the District Deputy. The Grand Lodge recommends that your introduction be brief. It's sufficient for the DDGER's Esquire to say, "I present Lee Martin, a Past Exalted Ruler of Lodge No. 3456, and District Deputy Grand Exalted Ruler for the Southeast District." You are entitled to Grand Lodge honors, with your Esquire leading the Lodge in the hailing sign (Page 21 of "Rituals of Local Lodges" Pocket Book; Code 511500 — *Exhibit R*).

## MESSAGE TO LODGE

Emphasize that you wish to be called upon to speak as soon as possible after the initiation, and that the meeting should be shortened by eliminating nonessential business. Balloting, reading long lists of applicants and controversial business should not occur on your official visit.

Limit your speech to the Lodge to no longer than 10 or 15 minutes. Be constructive and cover the important points of the Grand Lodge program. Reserve any criticism of administrative functions for a *private* talk with the responsible Officers. Your talk should be on topics of general interest to the membership. There are times when it is necessary to criticize the Lodge directly, but the damage that might be caused by creating an unfavorable impression on the membership, especially *new* Members, should be weighed carefully. It is *not* the province of the District Deputy to hand out punishment or make threats — and none should be given without first receiving approval from your supervising Past Grand Exalted Ruler, or on direct orders of the Grand Exalted Ruler.

## COMPLETION AND FILING OF OFFICIAL DISTRICT DEPUTY VISIT REPORT

You should fill out *completely* all pages of the report and **file it within the required seven days**. You'll find it much easier to complete and much more accurate if you fill it out the next day, while results are still fresh in your mind. It's easy to record information lightly with a pencil and then type it in. In this event, go over your report with the Exalted Ruler after the Lodge meeting, and forward him or her a copy after it has been submitted.

Be fair in your judgments, but thorough and accurate; report the true conditions of the Lodge. Don't gloss over deficiencies — the Grand Lodge can't help correct them unless your report is factual and honest. Many times, it will take courage, but this you owe to the Grand Exalted Ruler and the Order. We must stress that the visit to your own Lodge be conducted with the same diligence and truthfulness as the other Lodges in your District, and not be swayed by personal feelings. Just as an accurate review helps a Lodge improve and grow, and inaccurate report allows problems to continue or worsen. If you are truly concerned about your home Lodge, you must act in its best interests even when the duty is unpleasant.

Reports will be filed online at <https://www.elks.org/members/dds/ddvisits.cfm> (*Exhibit G*). See the illustrated, step-by-step instruction booklet for "Submitting Your District Deputy Reports Online via Elks.org" (*Exhibit H*). Be advised that your Area Sponsor may request a mailed copy of the online report.

As the Grand Lodge Representative, you remain trustworthy for pointing out all deficiencies and making recommendations for improvement to the Officers and leaders of the Lodge. Sixty days after a Lodge visit and report, you should request information from the Lodge advising you of the action taken to correct its deficiencies.

## OFFICER SELECTION

Instruct Lodges that Officer selection should not be based on personalities, but on Elksdom's *principles*. Point out the qualifications necessary to be a good Officer:

- Interest in building the Lodge and the Order.
- Willingness to give the Lodge the necessary time and effort required, and being aware of all the duties of the office.
- Acceptance of the responsibilities of office, recognizing that they go far beyond merely stating the rituals of the station well.
- Must be a *leader*, well-liked by the Lodge Members, and intelligent and forceful enough to develop good programs they can follow enthusiastically.
- Must certainly have the consent and support of the Officer's family and employer.

Emphasize that the Exalted Ruler-Elect confer with Officers and Past Exalted Rulers regarding Officer selection before making any commitments for *appointive* offices. Officers progressing through the chairs have distinct advantages — *provided* each Officer is qualified by ability and training, accepts the responsibilities of office and exhibits a sincere desire to serve the Lodge to the best of his or her ability. The

other Officers and Past Exalted Rulers must, however, have the courage to see that an Officer who shirks duties does not continue in office. *Every Officer should have the potential of being Exalted Ruler.* And to help future Lodge Officers start without controversy, review with the current Exalted Rulers and Secretaries the procedure for Local Lodge Nominations (Section 3.080) and Elections (Section 3.090), Laws of the Order. Immediately after their elections, each Lodge Secretary must send you a list of the elected Officers. Ask the Lodges about any open positions.

## LOCAL LODGE DIRECTORY INFORMATION

Remind Lodge Secretaries, as soon as the new Officers have been determined for the coming year, that the completed “Local Lodge Directory Information, PER listing, Statutory Committee Chairpersons and Committee Members” lists must be filed via CLMS2Web to the Grand Secretary. Do **NOT** wait until after installation!

## DUES — NONPAYMENT DROPS

Review with Secretaries Section 14.160, Laws of the Order, that “A Member owing one year’s dues to the Lodge . . . shall be dropped from the rolls . . . etc.” This is now mandatory — not optional!

## NEW LODGES

Now that you have spent several months traveling throughout your District and gauging the health of Elkdom in your Lodges, you are also the individual most competent to assess other potential sites for a Lodge in the non-Elk towns within your District. Write a letter to your Sponsoring Past Grand Exalted Ruler(s) with a copy to the State President, giving the names of communities where organization can begin and any details, such as prominent leaders and Elks who might form the nucleus of the organization committee.

Before starting to organize a new Lodge, the Laws of the Order require the District Deputy to secure permission of the Past Grand Exalted Ruler(s) of the Area and to submit petitions and applications for dispensation to Grand Lodge through him.

Carefully follow the “Developing New Lodges” Booklet (Code 510405, available free from the Grand Secretary). Remember that carelessness in organizing a Lodge often results in a bad Lodge. Insist on high standards of performance and strict compliance with all requirements.

Work closely with your State Association’s New Lodge Committee as well as the Grand Lodge Fraternal Committee, which will assist you at the direction of your Sponsoring Past Grand Exalted Ruler(s) following approval of the Lodge organization plans.

## START OF THE NEW LODGE YEAR

Up to this point in your term, you may have been dealing with the Lodge Officers and operations whose guidelines and goals were first established by your predecessor at the beginning of the Local Lodge year which now ends, just as this “follow-up and learning” phase of your District Deputyship. Now you will make the greatest personal impact on the Lodges of your District as you steer new Exalted Rulers into the Grand Lodge Programs and more firmly on the path to proper Lodge operation so that they will meet with success and the approval of their Members, your successor and the Order.

## FEBRUARY

STATUTORY LODGE COMMITTEE CHAIRPERSONS WORKSHEETS (*Exhibit O*) are now mailed directly to Lodges for filing online at [elks.org/clms2web/confirmcommittees.cfm](http://elks.org/clms2web/confirmcommittees.cfm). Follow up with unresponsive Lodges; either you and your Lodges supply the names of these Chairpersons to Grand Lodge promptly and correctly, or your Lodges begin their year cut off from communications that Grand Lodge will send directly to the Program Chairpersons.

## MARCH/APRIL CLINIC

The second required clinic — held in March or April — is a training and program session for Officers-elect of your District’s Lodges. Much of this clinic emphasizes the new Grand Lodge Program and its importance in developing activities to stimulate membership and attendance at Lodge sessions. The Officers must be thoroughly oriented in the program and the responsibilities they face in administering it.

Notify the Lodges of the date, time and place of this clinic at least three weeks in advance with a copy to your Sponsoring Past Grand Exalted Ruler(s). Stress those required to attend by Statute and suggest attendance by other Officers and Committee Members. You will find the new Officers eager to learn. Stimulate and encourage them by illustration, discussion and challenge.

As you have done for the previous clinic, prepare an agenda that covers all the important areas of both successful Lodge operation and full participation in the activities of the Grand Lodge Program by these new Exalted Rulers during the Local Lodge year just beginning.

Again, exhibit all Grand Lodge manuals and publications and explain their use. Call special attention to the EXALTED RULERS, LODGE OFFICERS AND COMMITTEE MEMBERS MANUAL and determine if each one present has read and understands their duties as described. Additional copies of this valuable booklet as well as of all the Manuals can be easily obtained from the Grand Secretary.

Note also that issues dealing with Lodge audits and the CLMS2 Membership Report — formerly addressed at the now-defunct January clinic — will now be discussed at the March/April clinic.

You now have a file of the Lodge Financial Reports, official Visit Reports, DDGER's Esquire and Auditor checksheets, your own Check Sheets plus the Work & Follow-Up sheets, the Grand Lodge Financial Report Evaluations, Membership Reports, copies of the Lodge Auditing & Accounting Committee's Reviews and Accident Prevention Self-Inspection Reports for each Lodge. Review this wealth of information and get a clear picture of areas still needing guidance and correction in each of your Lodges. Then decide which matters can be handled in open discussion as part of your clinic agenda, and which matters must be discussed separately with the Lodge Officers before, during or after the clinic.

Use information from the CLMS2 Membership Statistics Reports to compare the goals desired. Use this information to prod those Lodges with poor records of achievement. Open the meeting with a round-table discussion and call on those Lodges with successful programs to explain their methods. If desirable, the meeting can be broken into panel discussions just as in your first clinic. In any event, you must provide time either before the clinic or during the panel discussions for individual conferences with each Exalted Ruler to discuss with each the progress that Lodge is making on membership, lapsation, National Foundation, etc., and to check with each on correcting deficiencies found during your official visit. Demand prompt, constructive action to correct any deficiencies. Right after your clinic, send to your Sponsoring Past Grand Exalted Ruler(s) a short narrative on the clinic, clinic agenda and Attendance Report (*Exhibit B-1 to B-3*).

## **RITUALS**

Discuss the importance of ritualistic training for Lodge Officers. Members appreciate a ritual that is well performed. They are better informed as Elks and have a better understanding of the Order's goals and principles. Please encourage Lodge Officers not to overlook the value of conducting special Lodge and Public services that are impressive. They are vitally important to the image and success of all Lodges.

Caution Lodges that no part of the Order of Business of a Lodge may be omitted and that the prescribed rituals of "opening" and "closing" must be observed. While the Grand Lodge-approved shortened versions of the "Opening," and "Closing" Rituals may be used, all rituals must first be approved in the Lodge By-Laws by the Area Member of the Committee on Judiciary before those versions may be used. The Initiation Ritual was restored to the previous entire version at the 2017 Grand Lodge Session and is the one that must be used.

Also, it is not proper to dispense with the reading of minutes of the previous session or any other item listed in the order of business.

Emphasize the importance of conducting the affairs of the Lodge in a businesslike manner, answering all correspondence promptly, acting on dimits and filing reports on time.

## **ANNUAL REPORT**

### **(Laws of the Order, Section 16.010)**

As of April 1 of each year the membership portion of the Lodge Annual Report shall be filed electronically by the Grand Secretary. Each Lodge Secretary shall ensure that all Lodge membership information is current through March 31.

The charity portion of the Lodge Annual Report as of March 31 and payment of Grand Lodge per capita fees and assessments shall be transmitted to the Grand Secretary and paid by each Lodge on or before May 1.

If a Lodge fails to transmit any portion of the Annual Report or related payment in a timely fashion, it shall be subject to a fine of one hundred dollars (\$100.00) payable to the Grand Secretary. Failure to provide any portion of the Annual Report or required payments to the Grand Secretary shall constitute contumacy.

## **GRAND LODGE AND STATE ASSOCIATIONS DIRECTORY**

Since the March/April clinic is the first clinic for the new Lodge Officers for the year, you should remind them of the assignments of the Board of Grand Trustees, Grand Lodge Auditing and Accounting Committee, Committee on Judiciary and so on. Clearly inform your District's Lodges which Grand Lodge Area they are in, then display the current Grand Lodge and State Associations Directory as you explain each Grand Lodge Committee's duties and how Lodges are to locate the appropriate Member of each by assigned Area or Program. Also point out your State Association's pages with the various State Committees, since every Lodge is also an Association Member and should use the expert advice of these State Committees to succeed. Urge them to send their questions to the proper person to handle their problem. They should also know the name and address of their supervising Past Grand Exalted Ruler and the fact that he is willing to help with their problems. It is desirable for such matters to be cleared through you as District Deputy, but no Lodge is precluded from discussing problems directly with its Past Grand Exalted Ruler(s).

All Grand Lodge Officers and Committeemen want to help and are available whenever you need them. But Elkdom really thrives and prospers when it's not just a one-way street. During and even after your year, pass on any suggestions for improvement to the appropriate Members in Grand Lodge about our programs and procedures.

## **BUDGET**

Proper fiscal management is essential for a successful Lodge. Financial stability and solvency form the basic foundation for any Lodge. This solvency is predicated upon the proper budgeting and accounting procedures of the Lodge.



Each Local Lodge enjoys local autonomy in managing its financial affairs, limited only by the Laws of the Order. Remember, the Lodge enjoys the privilege of its existence only because it is Chartered as an integral part of the Order by the Grand Lodge as the parent organization. Every officer and member is obligated to obey the Statutes, rules and regulations of the Order.

One objective of a District Deputy is to encourage Lodges to adopt good business practices and become knowledgeable of, and comply with all Federal, State and local tax laws.

The Laws of the Order require a budget from each fund, corporation or separate entity of the Lodge as expressed in Sections 12.070 (Lodge), 16.030 (separate corporation) and 16.040 (club and other facilities). A separate segregated line item budget for the Lodge club, food service, health room, bingo, swimming pool, golf course and other entities, shall be instituted, as well as a monthly profit-and-loss statement of the Lodge, thereby using the Grand Lodge Uniform Chart of Accounts. Of extreme importance is that each area or fund of the Lodge be self-sufficient. It is against the Laws of the Order to use funds from the Lodge funds to maintain or support a social activity, such as the club fund, golf course, etc. For an explanation of the budgeting process, please refer to the Grand Lodge Auditing and Accounting Manual (Code 510100).

In these days of high costs, all Lodges need to closely monitor their fiscal condition and accounting procedures. Income and expenditures should be reviewed to keep them in line. If expenditures cannot be reduced, then Lodge dues and club prices need to be adjusted. Thorough study of conditions, proper budgeting and good accounting are a must.

### **FINANCIAL REPORTING SYSTEM (Laws of the Order, Sections 4.330 and 13.040)**

Each Local Lodge must comply with Section 13.040, Laws of the Order and the Grand Lodge Auditing and Accounting Manual (Code 510100). The "Financial Reporting System" [FRS] is the mandatory system for providing monthly financial reports to the District Deputies and the Grand Lodge Auditing & Accounting Committee Members. With the implementation of the FRS, the Annual Financial Report has been eliminated and Lodges are no longer required to have a Review or Audit performed by an outside Certified Public Accountant (CPA).

As a District Deputy, you are required to learn the FRS program and perform a monthly review of your Lodges. Each Lodge must file a financial report with FRS by the 3rd Friday of the month for the previous month. Three (3) required Financial reports from FRS: "00 P&L with Summary," "01 Balance Sheet," and "03 Grouped By Department" are to be provided to the Lodges by the District Deputy each month.

The District Deputy's examination should include all books and financial records of the Lodge, its Committees, Club, or separate corporation of the Lodge and any other activities conducted by the Lodge. The Local Lodges must comply with State and Federal laws on filing financial and tax reports. Some states require an audit report prepared by a CPA on gaming or other activities. Form 990 must be completed by a qualified accountant and filed annually by every Lodge. Failure to fully implement the FRS program will subject the Lodge to an initial \$100 fine, plus subsequent fines of an additional \$100 for each month's delay thereafter, not to exceed \$500 total.

### **GRAND LODGE SESSION — EXALTED RULER ATTENDANCE (Laws of the Order, Sections 4.240 and 12.120)**

The Exalted Ruler must attend the Grand Lodge Session before he or she may qualify to hold any Grand Lodge office. The Local Lodge pays the expense of its Exalted Ruler to attend as its representative. The ER is duty bound, not only to *register*, but to *attend all sessions*. Most districts and/or states plan for delegates to attend sessions together. At the April clinic and during the months remaining in your term, impress upon all your Lodges' Exalted Rulers that their presence and attention at all the Sessions represent not only a duty but a valuable opportunity to gain information to guide their Lodges through the remainder of their year of office. Advise your successor to work with officials from your state to ensure the attendance of all your Exalted Rulers. This clinic is also an appropriate time to stress that each Exalted Ruler should give a comprehensive report of the Sessions to the Lodge membership upon return home. Also, increasingly stringent IRS regulations make it imperative that every returning Exalted Ruler give a full accounting of the Lodge funds furnished, and return any unused portion to the Lodge, or risk subsequent discovery and difficulty over unreported income.

### **TAXES AND TAX RETURNS**

GENERAL: This is **not** intended to provide complete and comprehensive advice on payment of Federal, State and local taxes or filing of all tax returns. Rather, it is intended to provide a guide with suggestions and ideas to help Lodges ensure compliance with the tax laws. Lodges must be careful to maintain a reputation of being a law-abiding organization and not act to jeopardize our income tax exemption.

EXPERT ADVICE: The most effective way for a Lodge to stay out of trouble with taxing authorities is to seek advice from a tax professional. Do this when you have questions or are in doubt. At the time of the annual reporting ask the professional to review your practices for compliance with tax laws and regulations. It is suggested that the Secretary and Treasurer keep up-to-date in this area, maintain a file of pertinent publications, and be the point of contact for questions that arise.

**OBTAINING PUBLICATIONS:** Internal Revenue Service publications and forms may be obtained on the Internet by accessing [irs.gov/forms](http://irs.gov/forms). State and local publications should be obtained from the State income tax or sales tax office website and the local alcoholic beverage websites, as well as your local gaming website.

**PAYROLL TAXES:** Every Lodge that has employees must use IRS Publication #15, Circular E, “Employer’s Tax Guide,” which contains tax withholding tables and instructions for withholding, paying taxes, rendering returns and record keeping. Additional pertinent instructions are contained in IRS Publication #937, “Business Reporting, Employment Taxes, and Information.” Any and all payments made to the Lodge Secretary, Lodge Treasurer or any other officer for services performed are considered compensation by the IRS and payroll withholding taxes must be withheld. The only exception are reimbursements that are documented with receipts for the goods or supplies purchased.

**Returns.** Taxes must be paid and returns filed within specified due dates to avoid serious penalties and interest. Following are errors most frequently noted by the accountant:

1. Failure to withhold and pay income, social security and Medicare taxes for part-time employees, “casual labor,” “outside labor,” “extra help,” etc. Regardless of what the Lodge may call this expense the taxes must be paid whether the employee works full- or part-time.
2. Failure to withhold and pay such taxes for the Secretary and Treasurer who are officers receiving compensation and failure to recognize that these positions are subject to Federal and State minimum wage and overtime rules.
3. Failure to require employees to report tips of \$20 or more in a month and failure to withhold and pay taxes on tips.
4. Failure to pay Federal Unemployment Tax (FUTA) and State unemployment taxes on a timely basis.
5. Failure to recognize that volunteers receiving more than \$30.00 a month in Tips or Gratuities are employees under the U.S. Fair Labor Standards Act.

**EMPLOYER IDENTIFICATION NUMBER:** Each Lodge must have an EIN. This is a nine-digit number arranged as follows: 00-0000000. See IRS Publication #15, Circular E. The number must be used on all returns and other documents, only one number used for the Lodge. A separate corporation must have a separate EIN and would use that number on their returns.

**EXEMPTION FROM FEDERAL INCOME TAX:** Grand Lodge has been issued a group exemption (No. 1156) for all Lodges under Section 501(c)(8) of the Internal Revenue Code.

The basis for this exemption is that our exempt purposes are charitable and fraternal as expressed in the Preamble to our Elks Constitution, and Lodges provide benefits exclusively to Members, including Club, swimming pool, golf and similar privileges. Lodges should always act to preserve this important exemption. Grand Lodge is required to furnish IRS each year a list of additions to, and deletions from, the list of Lodges included in the exemption. Therefore, Grand Lodge must have accurate information on correct EIN numbers. This is updated each year through the Local Lodge Directory Information online form at CLMS2Web, and appears in the Local Lodge Directory listing for each Lodge. Upon receiving the Lodge’s copy of the annual Directory, Secretaries should verify that the EIN for the Lodge is entered correctly each year.

**INFORMATION RETURNS:** Most Lodges are required to file one or more of these returns each calendar year. Instructions are contained in IRS Publication #937, “Business Reporting, Employment Taxes and Information Returns.” Quite frequently when an accountant performs work for a Lodge, he will refer to errors of omission in this regard. Some returns most frequently involved are:

- ▶ Payment of interest of \$10 or more to holders of member bonds or notes — IRS Form 1099-INT.
- ▶ Payment of \$600 or more for non-employee compensation, such as accountants, attorneys, bands, etc. — IRS Form 1099-MISC.
- ▶ Payment of \$600 or more in winnings from raffles or drawings — IRS Form W-2G.
- ▶ Payment of \$1,200 or more in winnings from bingo, slot machines and other legal games of chance — IRS Form W-2G.

***NOTE: Amounts above are cash or Fair Market Value of the prize(s) awarded.***

**STATE AND LOCAL INCOME TAX RETURNS:** Each Lodge should consult its accountant, tax attorney or appropriate local officials to determine what returns are required. In some states, if the Lodge pays income tax on unrelated business income, it is also required to pay state income tax and provide a copy of the IRS Form 990-T.

**STATE AND LOCAL TAXES:** It is the responsibility of the Lodge to know and comply with the requirements for collection and payment of such taxes and rendering required returns. Generally, a Lodge can obtain a copy of the law and regulations by contacting the appropriate taxing authority. Advice on accounting for sales taxes is contained in the Auditing and Accounting Manual and in the Training Area of Lodge Accounting on [elks.org](http://elks.org).

**MEMBER NOTES OR BONDS:** Occasionally a Lodge will borrow money from Members and issue notes or bonds as security. The Lodge should maintain accurate and complete records of all such liabilities. An ongoing record should be kept to reflect the following:

- ▶Note or bond holder's name and Social Security Number
- ▶Amount of the note or bond
- ▶Date due for redemption
- ▶Rate of Interest
- ▶Date and amount of each interest payment

The Internal Revenue Service requires that each such interest payment of \$10 or more in a calendar year be reported on an information return, Form 1099-INT.

## **IMPORTANT FEDERAL TAX RETURN DATES**

- January:** •Fourth quarter payroll reports. This includes the Federal annual unemployment Form 940.
- W-2 forms are due to the employees by the 31st.
  - Information returns Form 1099 are due to recipient by 31st.
  - Form 1099 and Transmittal Form 1096 are due to IRS by 31st.
- February:** •W-2 forms, transmittal form W-3, are due to the Social Security Data Center by last day of month.
- April:** •First quarter payroll reports due by the 30th.
- July:** •Second quarter payroll reports are due by the 31st.
- August:** •Annual IRS Forms 990 and 990-T are due to be uploaded to [elks.org](http://elks.org) by the 1st and to the IRS by the 15th.
- October:** •Third quarter payroll reports due by the 31st.

**ALL LODGES AUDITED BY ANY TAXING BODY AND THE RESULTS THEREFROM SHALL BE REPORTED TO THE SPONSORING PAST GRAND EXALTED RULER(S) AND THE AUDITING & ACCOUNTING COMMITTEE MEMBER FOR YOUR AREA.**

**STATE TAX RETURN DATES:** Please consult your individual State Taxing Authorities for their filing requirements.

## **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 Lodges, State Associations (except their major projects) and the Grand Lodge. 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 posted at [Elks.org](http://Elks.org) (Code 51300). This booklet provides information as to procedures, coverage, claims reporting, and loss prevention. This liability coverage is paid for as part of the annual per capita payment to Grand Lodge.

A strong emphasis on the need for Local Lodges to properly control the service of alcohol is essential. The primary reason Local Lodges have a liquor license and maintain bar facilities 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.

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. Those involved in the service of alcohol, including volunteers, should take a training course.

Any entity or person that rents a Lodge facility must obtain insurance that names the Lodge as an additional insured. Facility Rental Insurance is available at [Elks.org](http://Elks.org).

### **Self-Inspection Forms:**

*Exhibit K* is the Self-Inspection form, which also may be downloaded at [www.elks.org/members/dds/selfinspection.cfm](http://www.elks.org/members/dds/selfinspection.cfm). The Local Lodge's Accident Prevention Manager (Trustee) will assist the District Deputy in completing the Self-Inspection form. The Self-Inspection form may also be printed from that hyperlink and mailed to the Grand Lodge Sponsors who request it. The DD Visit Report and Audit form are also available for download at that link.

### **Questions pertaining to coverage may be directed to:**

Grand Lodge Insurance Department  
Phone: (773) 755-4714  
Email: [insurance@elks.org](mailto:insurance@elks.org)

### **All liability-related incidents MUST BE IMMEDIATELY REPORTED to:**

GALLAGHER BASSETT SERVICES, INC.  
Phone: (844) 843-3557

### **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. All Local Lodges must participate in this Program, which provides coverage on buildings and contents on a replacement-cost basis. The Property Plus Program also includes equipment breakdown (boiler and machinery) and fidelity (crime) coverage. **This fidelity (crime) coverage satisfies the statutory bonding requirements in the Statutes of the Order.**

The Property Plus Insurance Program Guide is posted at [Elks.org](http://Elks.org).

## **VOLUNTARY INSURANCE PROGRAMS**

### **WORKERS COMPENSATION:**

This coverage is the exclusive remedy for work-related injuries. Workers' Compensation Insurance is mandatory in most states.

### **DIRECTORS AND OFFICERS/EMPLOYMENT PRACTICES (D&O):**

D&O/Employment Practice coverage is not included under the liability coverage available through the Master Liability Program.

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 Lodge. The policy also provides defense for allegations of employment practice type claims, including wrongful discharge, discrimination and harassment.

## **ACTIVITIES COMMITTEE**

This committee, created under Section 4.345 of the Grand Lodge Statutes, is charged with promoting, supporting and overseeing: Community Projects, Youth Activities, Hoop Shoot and Drug Awareness. Following are suggestions of how committee programs applicable to District Deputies can assist in demonstrating that ***"Elks Care — Elks Share"***:

### **DRUG AWARENESS PROGRAM**

**(Laws of the Order, Section 13.021(a); Grand Lodge Drug Awareness Manual\* and Grand Lodge Program)**

The Grand Lodge Drug Awareness Program calls for each Lodge to conduct its own program with training, guidance and materials provided through the National Drug Awareness Program Directors and the State Drug Awareness Chairperson, and directed by the Lodge Drug Awareness Chairperson.

Since 1982, the Elks have developed an effective, community-based drug prevention program by partnering with federal agencies including the Drug Enforcement Agency, Office of National Drug Control Policy, Substance Abuse and Mental Health Services Administration, and national organizations such as Pride Youth Programs. These partnerships ensure the Elks Drug Awareness Program addresses the leading drug abuse and related issues facing communities today.

Elks believe the youth of today are the leaders of tomorrow. With that in mind, the Elks Drug Awareness Program reaches out to adults and youth of all ages and backgrounds. Through the Lodges in communities across the country, Elks work to combat substance abuse. Elroy the Elk, the program's mascot, reminds young kids that hugs are better than drugs, while older kids see the effects

of alcohol consumption by wearing fatal vision goggles. Every year, the Elks Drug Awareness Program hands out more than seven million pieces of anti-drug literature to parents, teachers, and kids. The program includes, poster, essay and video contests, a drug quiz show, a speaking tour and various awards for outstanding youth and adult leaders.

As District Deputy, you should stress and encourage participation in the Drug Awareness Program. Require that the Lodges read the Drug Awareness Manual (Code DAP125 available to download) and follow its guidelines. *Exhibit Q* is the current order form listing the free literature that may be obtained through the State Drug Awareness Chairperson. The order form must be sent through the State Drug Awareness Chairperson. (These materials are paid for by the Elks National Foundation and donated to the public.)

### **For more information, please contact:**

Kent Gade, National Director

Drug Awareness Program

407 E. 22nd Street

Atlantic, IA 50022-2811

Phone: (712) 789-0731 • Fax: (712) 778-2687

Email: kentgade@gadeinsurance.com

*\*(Drug Awareness Manual — Code DAP125 — August 2017 — CD available at <http://elks.org/resources/dap/>)*

## **HOOP SHOOT FREE THROW PROGRAM**

**(Laws of the Order, Section 13.021(a); Hoop Shoot Manual and Grand Lodge Program)**

The Elks National Hoop Shoot provides Lodges with a great opportunity to connect with their communities and serve youth in a meaningful way. It turns out that the Elks have been developing gritty kids for more than 40 years through the Hoop Shoot program — long before researchers and experts concluded that grit was the most accurate indicator of future success. Now, educators and youth advocates are looking for programs that develop grit. Every year, Hoop Shoot participants develop grit by setting goals, working hard to achieve them, failing and bouncing back to try again and work even harder the next year. Don't believe us? Be sure to watch the *True Grit Tuesday's* video series found online at [www.elks.org/hoopshoot](http://www.elks.org/hoopshoot).

In August, the Elks National Foundation mails instructional kits to Hoop Shoot Directors at all levels of competition. Lodge Director kits are mailed directly to Lodges. Each Lodge should ensure that the kit is delivered to its Hoop Shoot Director. In addition, all Hoop Shoot materials, including contact information for State and Regional Hoop Shoot Directors, can be found at [www.elks.org/hoopshoot](http://www.elks.org/hoopshoot). The website is an excellent resource for all Hoop Shoot Directors.

The Hoop Shoot National Finals are held each April in Chicago. Of the 72 finalists who compete at the National Finals, six will be named Frank Hise national champions and will have their names permanently inscribed in the Naismith Basketball Hall of Fame. For more information on the Elks National Hoop Shoot, please contact the Elks National Foundation Programs Department at (773) 755-4758 or e-mail [hoopshoot@elks.org](mailto:hoopshoot@elks.org).

## **YOUTH ACTIVITIES**

### **(Laws of the Order, Section 13.021(c), Youth Activities Program Manual and Grand Lodge Program)**

The youth of our nation represent the future of America. Our youth go to the very heart of our society. You are urged to direct your efforts toward the support of the Grand Lodge Youth Activities program and its related activities. This program is described in detail in the Youth Activities Program Manual and its annual supplement. Please read and study the Manual. As District Deputy, you should stress and encourage participation in the various contests and their closing dates. Encourage the Lodge to have a vigorous and highly visible youth program with a very active and working Youth Activities Committee.

Urge the Lodges to promote an active youth program, responsive to the needs of the youth in the community. Point out to the Exalted Rulers, Secretaries and Lodge Youth Activities Chairpersons, the importance of entering the necessary information in the monthly Records Book of Volunteer, Youth, Charitable and Community Service programs (*Charity Records Workbook*). This booklet should be kept up-to-date and used in its total concept to be effective. If requested, the Youth Activities Report information (taken from that booklet) MUST be in the hands of the State Chairperson by April 1.

The Lodge Youth Activities Committee is authorized to organize and maintain a youth organization to be known as 'The Antlers of the Benevolent and Protective Order of Elks' according to the rules and regulations promulgated by the Activities Committee of Grand Lodge.

## **PUBLIC RELATIONS AND MEMBERSHIP MARKETING COMMITTEE**

### **(Grand Lodge Media Relations Handbook and Grand Lodge Program)**

This Grand Lodge Committee was reconstituted under 2014 Grand Lodge Statute 4.357. District Deputies are asked to call attention to the Media Relations Handbook and emphasize the importance of the Image of Elkdom to each Lodge and the entire Order.

Telling the American public about Elkdom is of paramount importance to the Order. We have left our accomplishments hidden from the public for too long. It is time the Elks are recognized for their many benevolences.

Every Member of the Order belongs to the Public Relations Committee. By your actions you reflect to the public what an Elk is. You are the window through which the public views Elkdom. You are the image of an Elk.

There is a difference between public relations and publicity. They are not the same, although publicity is a part of public relations. Any Lodge can get publicity; that's no problem. The problem is to make certain that all publicity reflects a positive Image of Elkdom and of the Local Lodge involved.

Public relations does not mean community projects and activities alone, but includes the manner in which we meet and greet our visitors — the way we conduct ourselves in our Lodges and in public. By our actions we can command admiration and respect in our communities.

Of extreme importance to the image and welfare of Elkdom is the proper attitude of individual Elks toward their Lodge and Elkdom. It is important that we put our best foot forward. Our good works do not necessarily speak for themselves. We have to bring them to the attention of the public so that our fraternal purpose is understood.

Especially impart to the new Exalted Rulers the role they must take by the Laws of the Order, Sections 9.140, 9.150, 16.060, 16.140, in preserving the quality of their Elks Lodge so that it avoids both the reality and the reputation of being a honky-tonk or gambling den. Where such a situation develops, the Grand Lodge is left with just one very severe option. The District Deputy should stress and encourage the Lodge Public Relations Committee to use the national and state backgrounders in the Lodge's local news releases.

## **MEMBERSHIP PLANNING PROGRAM**

As District Deputy, you should know the Order's membership planning program as recommended in the Membership Program and Planning Manual (Code 510400). You should be able to explain the program, how to set goals and how to use the membership statistical charts in the back of that Manual to check the progress of the Lodge membership planning program. "Steps to inaugurate a successful membership planning program" has been provided for your reference on Page 22. In addition, *Exhibit M* provides a form for comparing membership figures for all of your District's Lodges. Also, *Exhibit N* allows you to display a particular Lodge's membership statistics covering 25 years.

As District Deputy, you should be the prime mover in promoting membership procurement. At the April clinic, you should stress and determine if the Lodges have established a membership management team (which consists of the Exalted Ruler, Secretary, the Membership and Lodge Activities Chairpersons, and the Orientation and Retention Coordinators). You must follow up to ensure that the management team is fulfilling its responsibilities. If not, this information should be reported to the Sponsoring Past Grand Exalted Ruler(s).

# **STEPS TO INAUGURATE A SUCCESSFUL MEMBERSHIP PLANNING PROGRAM**

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## **PREPARATION**

1. The Exalted Ruler must study the entire Membership Program and Planning Manual (Code 510400); and the Chairpersons of the Membership Committee, the Chairperson of the Indoctrination Committee, the Lodge Activities Chairperson, and the Chairperson of the Lapsation Committee must study at least the portions of the manual which affect their particular parts of the Membership Control Program. Lodge Activities are essential to Membership appeal and retention.

## **MANAGEMENT TEAM**

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

## **GOALS**

3. We always do better when we are challenged to meet specific objectives, so definite goals should be set. The goal suggested for Membership Procurement for the year is to add to the roll not less than 10% of the membership total at the beginning of the year. In other words, if the membership of the Lodge was 700 on April 1, during that Lodge year at least 70 members should be added to the roll. The goal for lapsation is to close the Lodge year with a total of 2% or fewer members dropped for non-payment of dues and 6 months in arrears in dues based upon the membership at the commencement of the Lodge year. Thus, in order for the membership program to meet this goal, a Lodge commencing the year with 700 members should not have more than a combined total of 14 members dropped or owing 6 months dues at the completion of the Lodge year.

## **PROGRAM**

4. When the program has been defined and the goals established, meetings of the Membership, Retention and Orientation committees should be held. At these meetings, the entire program of each Committee is explained and adjustment made for acceptable suggestions from the members of the Committees. Everyone must understand the program and the goals. Everyone must be enthusiastic and believe the program can be achieved.

## **EVALUATING RESULTS**

5. In the back of the Membership Program and Planning Manual, 12 Membership statistical charts are published – one for each month. The Secretary must fill in the figures on the appropriate chart promptly each month so the Membership Management Team (see 2 above) can review the condition of the membership on the first of each month. This allows the management, headed by the Exalted Ruler, to discover promptly any portion of the Membership Planning Program that is not succeeding and to strengthen it with increased emphasis or new ideas. If this plan is NOT followed, the year may be over before it is discovered that the goals are not being attained. At that point, it is usually too late to make successful corrections.

## **ACCOMPLISHMENTS**

6. The stronger you stress membership to the Lodges and their Officers, the more likely the Lodges will achieve the goals. Start early and do not let up until the Lodge year has been completed. Again, the District Deputy shall work closely with the State and District Chairpersons, and should work with them in their efforts to retain Members.

***This suggested program applies known methods of good business — make sales and collections. If your present program is faltering, try this plan.***

The District Deputy is required to work closely with the State and District Chairpersons to improve membership. The State Association's role is to assist the Grand Lodge. The District Deputy should not leave it up to the State Association to do what the District Deputy, as a member of the Grand Lodge, is responsible for.

## **FRATERNAL COMMITTEE**

This committee was created under Section 4.355 of the Grand Lodge Statutes. The committee is charged with promoting, supporting and overseeing: Americanism, Elks National Foundation, Flag Day, Elks Memorial Day, Membership, Lodge Activities, State Associations and Veterans programs. Following are suggestions of how the committee programs applicable to District Deputies can assist in demonstrating that "*Elks Care — Elks Share*":

### **LODGE ACTIVITIES**

#### **(Americanism Manual, Lodge Activities Manual and Grand Lodge Program)**

Lodge activities encompass almost everything the Lodge does, including social functions, club activities and community service projects. Therefore, the primary function of Lodge activities is to offer friendship, physical facilities and pride of membership.

The District Deputy should encourage each Lodge to have active and enthusiastic Americanism and Lodge Activities Committees. These Committees should utilize the Americanism and Lodge Activities Manuals from the Grand Lodge for their many proven ideas and successful projects. Stress to every Lodge that its vitality depends on the activities it has for its Members and families. A Lodge that has many interesting and diverse activities will maintain the interest of its Members and thereby obtain new Members.

In addition, some of the activities such as the Americanism Essay Contest and the recognition of proper display of the American Flag will also encourage involvement within the community. The District Deputy should also encourage the Lodges to recognize worthy Members through the certificates for worthy Members.

The Americanism and Lodge Activities programs are detailed in the Americanism and Lodge Activities Manuals and an annual leaflet. Please read the Manuals. As District Deputy, you should encourage participation in the various contests and their closing dates.

For efficiency, many of Elksdom's programs are conducted through cooperation with your State Association, with Lodge Committee Chairpersons joining into an information-and-supply network that ensures prompt support and coordination from district, state and national chairpersons in the same line of endeavor and expertise.

As District Deputy, you should be familiar with those programs of the Lodge and State Association that are interrelated, and with the necessity for coordinating these activities. As District Deputy, you should encourage participation in the various State Association programs, including:

- Membership
- Major Project
- Hoop Shoot Playoffs
- Inter-Lodge Activities
- Large-scale Drug Education
- Ritual Competition & Clinics
- Veterans Assistance & Outings
- Grand Lodge Session Housing Arrangements
- District & Statewide Americanism Programs
- Public Relations and Government Relations Projects
- Elks National Foundation Scholarships and Fundraising
- Seminars on Business Management, Insurance and State Laws

The District Deputies should encourage the Lodges to participate in the All-American Lodge contest. The District Deputies are required to confirm all entries and point values before they are submitted for further evaluation.

## **ELKS NATIONAL FOUNDATION**

### **(Constitution, Article V, Laws of the Order and Section 4.270; Elks National Foundation Annual Report, and Grand Lodge Program)**

Since 1928, the Elks National Foundation, the charitable arm of the Benevolent and Protective Order of the Elks, has helped Elks build stronger communities through programs that support youth, serve veterans, and meet needs in areas where Elks live and work. Today, these programs include the **Community Investments Program**, which offers grants to Elks Lodges; Elks State Association grants; ENF scholarships, including scholarships for Elks families; youth programs like the Elks Drug Awareness Program and the Elks National Hoop Shoot Program; and the Elks National Veterans Service Program.

The Elks National Foundation is able to help Elks build stronger communities thanks to donations from generous supporters. Stress the importance of supporting the ENF to Members in your District.

- Encourage every Lodge to meet the GER's goal for per Member giving to qualify for a \$2,000 CIP Gratitude Grant to serve the community. Visit [www.elks.org/enf/community](http://www.elks.org/enf/community) for details of the Gratitude Grant and other ENF grants, including the Beacon, Promise and Impact grants.
- Suggest that Lodges publish articles about the ENF in Lodge bulletins or on Lodge websites to educate Members about the importance of giving.

- Promote the ENF by ensuring each Lodge in your District has an active ENF Fundraising Chair, who will organize fundraisers, demonstrate the importance of giving to the ENF, and recognize donors for their contributions.
- Encourage all Lodge Officers to lead by example by giving to the ENF themselves. Make sure donors know that all contributions to the ENF, a 501(c)(3) public charity, are tax-deductible.

For more information, visit [www.elks.org/enf](http://www.elks.org/enf) or contact:  
 Elks National Foundation, Inc.  
 2750 N. Lakeview Ave.  
 Chicago, IL 60614-2256  
 (773) 755-4728 | [enf@elks.org](mailto:enf@elks.org)

## **ELKS NATIONAL VETERANS SERVICE COMMISSION**

**(Laws of the Order, Section 4.290; Elks National  
 Veterans Service Commission Manual and Annual  
 Report, and Grand Lodge Program)**

The Elks are committed to their mission, *“So long as there are Veterans, the Benevolent and Protective Order of Elks will never forget them.”* The Veterans Service Commission takes that pledge one step further and promises service to our nation’s veterans and military members with a special focus on service to those in need.

Here are four of our national programs. Don’t forget that States and Lodges have many other programs that are not covered here.

**WELCOME HOME:** Our newest program, this was inspired by a partnership with the Department of Veterans Affairs to help end veteran homelessness. The Welcome Home program helps Lodges gather welcome home kits for veterans entering homes; provides emergency assistance to prevent homelessness for veterans; spreads public awareness; educates landlords and communities about renting to veterans; and supports Elks who provide direct housing assistance to homeless veterans.

Together, we can provide the tools and support necessary for homeless veterans to transition successfully into healthier and more stable lives. Reach out to veterans in need in your area by supporting homeless shelters, transitional programs and VA facilities.

**VETERANS AFFAIRS VOLUNTARY SERVICE PROGRAM:** The Elks are a committed partner with VA hospitals and facilities across the nation. More than 140 Elks serve as Veterans Affairs Voluntary Service Representatives, assisting hospitalized and recovering veterans by providing comfort, support and friendship. Hundreds more Elks serve as Deputy VAVS Representatives. VA staff have come to learn that when they need help, they can count on the Elks.

**FREEDOM GRANTS:** Freedom grants offer a unique opportunity to harness the Elks’ passion for serving veterans and military members and turn it into projects that offer tangible results. These competitive grants are awarded to Lodges whose projects are judged to best serve the needs of veterans and/or active-duty military members. Meaningful Elks involvement is strongly encouraged. Freedom Grants must focus on one of these five areas of increased need: employment; homelessness and housing; military families; health; or educational support.

**VETERANS LEATHER PROGRAM:** Elks volunteers work with local hunters to collect, salt and prepare donated hides. All hides are then delivered to tanneries, and the finished leather is used for therapy kits for recovering veterans and professionally crafted gloves for veterans in wheelchairs.

More information about these and other programs, including applications, guidelines and order forms, is available at [www.elks.org/vets](http://www.elks.org/vets).

For questions about any of the Veterans’ programs or how to become a VAVS Rep, please contact:

Elks National Veterans Service Commission  
 2750 N. Lakeview Avenue  
 Chicago, Illinois 60614-1889  
 Phone: (773) 755-4736

## **ELKS VETERANS MEMORIAL BUILDING**

Dedicated in 1926 to those Americans and Elks who gave their lives in the armed services of our nation during World War I, this awe-inspiring monument to patriotism and valor has since been rededicated to the selfless Americans who made the ultimate sacrifice in World War II, Korea, Vietnam, Grenada and Kuwait. All Elks families are invited to tour this impressive structure whose interior contains numerous world-renowned and irreplaceable works of art in harmony with the fraternal love, which is felt throughout every room. Located north of Chicago’s downtown business area overlooking Lake Michigan at 2750 N. Lakeview Avenue, the Memorial is open to the public from noon to 4 p.m. Monday through Saturday from the week of April 15 to the week of November 15. Closed Sundays.

## **REPORTING OF CHARITABLE STATISTICS**

The District Deputy shall remind all Lodges to begin their charitable and community service activities, and to maintain the vital statistics in the Charity Records Workbook or directly into the Chicago Lodge Membership System at <http://www.elks.org/grandlodge/reports/PendingCharityReports.cfm>. A full report is required to be filed online as soon after the Fraternal year ends on March 31 and before April 30. With CLMS2Web, the booklet should be viewed as a worksheet to facilitate the online filing. Lodge Secretaries would find it helpful to file those statistics immediately before or after they are reported at Lodge meetings to avoid filing them all at once at the end of the year.



## THE ELKS MAGAZINE

### **(Laws of the Order, Section 4.280; Annual Report of Elks National Memorial and Publication Commission, and Grand Lodge Program)**

The Elks Magazine is the finest and most informative publication produced by all the community service organizations. Its primary purpose is to place in the hands of every Member a wealth of information about their Order and its beneficent power and uplifting mission, so that out of this recognition will come deeper pride of membership and greater participation. Information on the many charitable and patriotic activities of our Lodges published throughout the year comes from submissions by the Lodges following the instructions found in the “Fraternal Guidelines” (*Exhibit P*).

Questions concerning The Elks Magazine should be directed to:

The Elks Magazine  
425 W. Diversey Parkway  
Chicago, Illinois 60614-6196  
Phone: (773) 755-4900 • Fax: (773) 755-4792  
Email: [elksmag@elks.org](mailto:elksmag@elks.org)

As District Deputy, please follow up to ensure your Secretaries update their Chicago Lodge Membership System2Web (CLMS2Web) frequently. This synchronizes and updates the mailing database for The Elks Magazine. Keeping CLMS2Web accurate guards against incorrect addresses, which cost the Order thousands of dollars every month, and helps ensure that Elks Members receive their copies of The Elks Magazine. Accuracy also ensures that mailing labels and address files are available to Lodges and State Associations at extremely low prices from the Magazine Label Department.

Lodge CLMS backup reports are available in the DDGER section of Elks.org under “Extended Access,” “DDGERs,” “Reports.”

**Questions concerning CLMS2Web** should be directed to your State CLMS2Web coordinator(s). A link to listings is found on the [www.elks.org](http://www.elks.org) CLMS2Web page.

**Members may receive The Elks Magazine** in the mail or online. Registration for the online option automatically suppresses the hardcopy edition in the mail. Online registration through [www.elks.org](http://www.elks.org) is found under “Members Only,” then “Elks Magazine Online.”

**Questions for the Circulation or Label Departments should be directed to:**

Circulation Department  
The Elks Magazine  
425 W. Diversey Parkway  
Chicago, Illinois 60614-6196  
Phone: (773) 755-4742 • Fax: (773) 755-4743  
Email: [magcirc@elks.org](mailto:magcirc@elks.org)

## SPECIAL INSTRUCTIONS

Because there are certain situations or procedures which are not normally part of the yearly agenda in most Lodges, we have gathered them in this separate reference section, to be available should one of your Lodges require assistance in these specific areas.

### ASCAP – BMI – SESAC MUSIC ROYALTIES

To prevent misunderstanding and to avoid violating copyright laws when bands perform copyrighted material in the Lodge facilities, the following is a clarification of the amendment to United States Code, Section 110, Title 17, which took effect November 25, 1982, and pertains to provisions for performance of music under copyright law.

An event held for MEMBERS AND GUESTS is NOT an infringement of the Copyright if the PROCEEDS from the social function, after deducting reasonable cost, are USED FOR CHARITABLE PURPOSES. Reasonable cost could include many facets of overhead expenses and other cost items. It is also suggested that where recorded, reproduced or live music is engaged for a Lodge social function, the event be labeled for a charitable cause or purpose.

For all practical purposes, therefore, it is no longer necessary for Lodges to obtain licenses from or pay royalties to ASCAP, BMI and SESAC unless they use recorded, reproduced or live music for financial gain, or to which the general public is invited.

It is recommended that a simple record be maintained whenever recorded, reproduced or live music is used, showing the income produced, the total reasonable costs of producing the performance, and the charity to which the remaining proceeds were contributed. That record can simply be included in the minutes of the Lodge meeting at which a report of the event is made.

### BINGO

The Lodge must comply with the state and local laws in regard to bingo. You may have non-Members participate. The activity must be staffed solely with volunteers and no individual or private interest should profit from the activity. It is required that you have a separate budget and bank account for the bingo. The Lodge must institute the proper accounting system as to revenue and expenditures for the bingo operation. Section 513(f) of the Internal Revenue Service Code removes proceeds from certain bingo games from the term “unrelated trade or business income.” In order to be eligible for exemption, the bingo game must neither violate state or local law nor compete with any commercial activity.

### INCORPORATION — LODGE

#### **(Laws of the Order, Sections 16.020 and 16.030)**

If you wish to incorporate your Lodge (Section 16.020) or form a separate corporation (Section 16.030), follow these Sections as to procedure. For suggested forms, see Appendix (Pages 239–245) of current Statutes Annotated.

## **BUILDING, LEASE AND/OR FINANCIAL TRANSACTION APPLICATION**

### **(Section 16.050, Laws of the Order)**

Any Lodge contemplating a building or financial transaction should be completely familiar with the provisions of Section 16.050 since approval of the Board of Grand Trustees requires compliance with this Section. Local Lodges must submit a Building Application and obtain a permit from the Board of Grand Trustees for permission to build, buy, sell, remodel or lease property, or borrow money, as set forth in the provisions of Section 16.050 through the Sponsoring Past Grand Exalted Ruler(s) of the Area.

The Sponsor knows the Grand Lodge requirements and can save a Lodge a lot of time by catching errors or omissions in advance. The Board of Grand Trustees must have approval of the Sponsoring Past Grand Exalted Ruler(s). You will do well to advise the Lodges in your District to follow this procedure.

Questions concerning the Building Applications should be directed to the appropriate Building Applications Member (East or West) Grand Trustee having jurisdiction. Their names and addresses appear in the Grand Lodge and State Associations Directory published annually as well as the instructions which accompany the Building Application forms sent by the Grand Secretary upon request.

To obtain the necessary Building Application Forms, please contact:

Office of the Grand Secretary  
2750 N. Lakeview Avenue  
Chicago, Illinois 60614-1889  
Phone: (773) 755-4700 • Fax: (773) 755-4790  
Email: [grandlodge@elks.org](mailto:grandlodge@elks.org)

## **END OF TERM**

From April until July, continue to monitor the operations of your Lodges, especially those known to be in need of help. Verify that all of your New Exalted Rulers will be attending AND participating in the July Grand Lodge Session. And finally, once your successor is sworn in, provide all the help you can to ensure a smooth transition for your district. Your experience as the most recent Past District Deputy also makes your advice the most valuable.

## **CONCLUSION**

Finally, the office you hold is NOT just a position of honor. You must be willing to stand up and be counted as one who has responsibilities that will be enforced. It's easy for anyone to "go along to get along," but this will not accomplish anything to advance our Order and will hurt the Lodges of your District. Your job takes courage, sacrifice, ability, time and hard work. Your Grand Exalted Ruler expects this from each of you. If you do your job sincerely and efficiently, the Grand Exalted Ruler and Grand Lodge will stand behind you — and you'll leave a record of splendid service in the annals of our Order.

Thanks for your attention . . . and the best of luck to each of you!

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# EXHIBIT A

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(WRITE LETTER FOLLOWING RETURN FROM GRAND LODGE SESSION)



A Fraternal Organization

## YOUR LETTERHEAD

DATE

To All Exalted Rulers:

At the **20xx** Grand Lodge Session held in **City & State, name of the Grand Exalted Ruler of Lodge Name, State & No.**, was installed as the new Grand Exalted Ruler for the year **20xx-20xx**.

At this Session, I had the honor of being installed as District Deputy Grand Exalted Ruler for the **District Name & No.**, I want to assure you that I am at your disposal to assist you and your Lodge in any way that I possibly can. I want you, your Officers and your Members to feel free to call upon me at any time.

The first District Deputy Clinic will be held at **location** on **date**, at **time**. According to the Laws of the Order, it is necessary that you ensure that the Exalted Ruler, Leading Knight, Secretary and the Chairperson of the Board of Trustees be present.

Enclosed is a copy of my official visit schedule. Inform me as soon as possible of any factors which might influence your Lodge's date so we can arrange an alternate date.

I request that you put me on your mailing list for all of your bulletins, and post my picture, address and phone number where Members will see them.

I am looking forward to working with you and your Lodge.

*Sincerely and fraternally,*

**Name and Title**

**cc:** Lodge Secretary

## EXHIBIT B-1

### ATTENDANCE REPORT — DISTRICT DEPUTY CLINIC

File online at [Elks.org/members/dds/otherforms.cfm](http://Elks.org/members/dds/otherforms.cfm)

DDGER: \_\_\_\_\_ DATE OF CLINIC: \_\_\_\_\_

STATE & DISTRICT: \_\_\_\_\_

P = Present

A = Absent

E = Excused

Click on boxes at left to select/unselect.

Hosting Lodge	Lodge Name & Number	Exalted Ruler	Leading Knight	Lodge Secretary	Trustee Chairperson	TOTAL PRESENT
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
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<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

COMMENTS:

E-MAIL, FAX OR MAIL A COPY TO YOUR SPONSOR(S).

E-mail a copy to the Grand Secretary at [DDGERfile@elks.org](mailto:DDGERfile@elks.org)

## EXHIBIT B-2

# “Adapt any part of this Agenda for your Clinics”

(Items in Bold are Mandatory at designated Clinic)

- I. Call to Order.
- II. Invocation and Pledge of Allegiance to the Flag.
- III. Welcome by the District Deputy, the Host Exalted Ruler and Introductions.
- IV. Stress the following parts of the Grand Exalted Ruler’s Program.
  - a) Membership in all its phases.
    1. A dynamic year-round New Members program.
    2. A well-planned orientation program.
    3. Impressive Ritual performance.
    4. A strong year-round reinstatement program.
    5. An active dues collection program to increase retention.
  - b) Community Service and the Image of Elkdom.
    1. Stress Lodges continually seeking needs to be filled in their community, doing service and maintaining Charity Records at <https://www.elks.org/grandlodge/reports/PendingCharityReports.cfm>
    2. Importance of establishing good relationship with all local media.
    3. High-visibility participation in various community-spirit events.
    4. Well-maintained and attractive Lodge building and grounds.
  - c) Youth Activities
    1. Antlers Programs.
    2. Boy and Girl Scout sponsorships.
    3. Scholarships.
    4. Youth Week.
    5. Hoop Shoot; Soccer Shoot.
    6. Drug Awareness Program.
  - d) Elks Veterans Service Work
    1. Army-Of-Hope Program.
    2. Welcome Home (end homelessness)
    3. Hospital, Hospice & home Visits.
    4. “Stand-Down” Programs at Lodge or VA facility.
  - e) Elks National Foundation
    1. Brief History of Foundation.
    2. GER’s Per Capita Goal, pledge and bequest programs.
    3. CIP Grant Programs
  - f) The Elks Magazine
    1. Use and read.
    2. Keep Members’ address list up-to-date.
  - g) Public Relations
    1. Call attention to the online Membership & Media Relations Manuals in the Membership Toolkit section at [elks.org](https://www.elks.org).
    2. Emphasize the importance of the image of Elkdom to each Lodge and the entire Order.
  - h) Lodge Activities: Flag Day, Memorial Day, Mother’s Day, etc.
  - i) Americanism
    1. A U.S. Flag in every Classroom Program.
    2. Essay Contests in all schools in district.
    3. Fly the Flag Program in the GL Fraternal Committee section at [elks.org](https://www.elks.org).
  - j) Fraternalism
    1. Stimulating Lodge Attendance.
    2. An active PER Association in each Lodge.

(continued on reverse side)

# EXHIBIT B-3

## CLINIC AGENDA

(continued from reverse side)

k) Family Participation.

1. Joint programs for spouses.
2. Teenage programs with parents attending, etc.

l) Awards.

1. "Elk of the Year" Award – selected by Committee.
2. "Officer of the Year" Award – selected by PER Association.
3. "Citizen of the Year" Award.

m) The need for New Lodges.

V. Communications.

- a) Read and answer your mail promptly.
- b) Present Grand Lodge and State Association Communications to the Lodge promptly.
- c) All Officers should read the Grand Lodge Newsletter.
- d) Prompt action to implement communications.
- e) Effective communications, etc.

VI. Improvement of Lodge and Club Financial Structure.

- a) Budget.
- b) FRS – Use Uniform Chart of Accounts in the A & A Manual.
- c) Club Management.
- d) **Reminder of requirement for selection and contract with the preparer of the Lodge's Form 990/990-T including mandatory due date of Forms to Grand Lodge by August 1st. (August Clinic)**
- e) **Reminder of due dates of final FRS data and Forms 990/990-T. (April Clinic)**

VII. Discussion and display of various Grand Lodge Manuals, Handbooks, and Posters.

VIII. Discussion of Reports.

- a) CLMS2 Statutory Lodge Committee Chairpersons Report.
- b) Annual Report – P. 1 Membership; P. 2 Charity Figures, Per Capita Dues
- c) Financial Reporting System [FRS] monthly upload.
- d) CLMS2 Membership Report.
- e) CLMS2 Lodge Directory Information Report.

IX. District Deputy Visitation and Inspection.

- a) Date and Time.
- b) Initiation by Elected Officers.
- c) Meeting with designated Officers.
- d) Check Sheets.
- e) Written and Online Reports.
- f) Closing Club.
- g) Other pertinent items.

X. Inter-Lodge Activities.

XI. Support of State and/or District Major Projects.

XII. Panel Discussions led by preselected Past District Deputies or others qualified in specific fields:

<u>SUBJECT</u>	<u>ATTENDED BY</u>
1. Auditing, accounting, office procedures, club management and a complete review of the online Uniform Chart of Accounts.	Secretaries, Treasurers, A & A Committee Chairmen, Trustees, Club Managers and Lodge Officers not involved elsewhere.
2. Membership Control, Procurement, Investigation, Orientation, Lapsation, Stray Elks, Reinstatements and Lodge Activities.	Exalted Rulers, Membership Committee Chairmen, Orientation Chairmen, Lapsation Chairmen and Lodge Activities Chairmen.
3. Charity, Youth Activities, Veterans Service, Hoop Shoot, and National Foundation.	Leading Knights, Youth Activities, Veterans Service, Hoop Shoot, National Foundation and Scholarship Chairmen.

XIII. Question and Answer Session.

XIV. Adjournment.

## EXHIBIT C

### 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 in Exhibit F, 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 990/990-T filed with IRS \_\_\_\_\_. Uploaded to elks.org \_\_\_\_\_.
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 \_\_\_\_\_; Vocalist \_\_\_\_\_;  
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 the 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. Has Exalted Ruler scheduled an Elks Training Session? ☐ Yes ☐ No  
Will that be done? ☐ Yes ☐ No
16. Does Lodge Secretary submit written transaction reports to the Lodge at 1st sessions in April and October?  
(See Exhibit S) ☐ Yes ☐ No
17. Does Board of Trustees submit written reports to the Lodge at 1st sessions of each month?  
☐ Yes ☐ No
18. 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]



## EXHIBIT D

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(WRITE LETTER FOLLOWING RETURN FROM GRAND LODGE SESSION)



A Fraternal Organization

### YOUR LETTERHEAD

DATE

Lee Martin, Exalted Ruler  
Paris Lodge No. 816, BPOE  
P. O. Box 760  
Paris, TN 38242-0760

Dear Exalted Ruler Martin:

This is to inform you that I will be making my official visit to the Paris Lodge No. 816 on **date**. I expect to arrive at **time** and will want to meet with you, your Secretary, the Chairperson of the Board of Trustees, the Chairperson of the Club Management Body, the Chairperson of the Auditing and Accounting Committee, the **Chairperson of the Membership Committee** and the Accident Prevention Manager.

Enclosed is a copy of Exhibit C. Please have your Secretary fill out the appropriate information for the District Deputy visit.

Also, I require that you have a copy of the following:

1. Copy of the annual Lodge budget as adopted by the Lodge
2. Copy of the Club Managing Body budgets (club, dining room, health room, swimming pool, golf course and bingo) as adopted by the Lodge
3. Copy of the Lodge profit-and-loss statement
4. Copy of the club and others profit and loss statement

At **time** I would like to meet with your other Officers.

I will expect you and your elected and appointed Officers to perform the initiatory ritual during the meeting.

*Sincerely and fraternally,*

**Name and Title**

cc: Lodge Secretary

# EXHIBIT E-1

## GUIDE FOR REVIEW BY DDGER AUDITOR

— AUDIT COMMITTEE REVIEW —		YES	NO	N/A
1.	Did the Audit Committee perform its financial reviews in July, October and January and file a written report with the Lodge as required by Section 13.040(i) of the Statutes? <i>Review Lodge meeting minutes and copy of report submitted by the committee.</i>			
2.	Does the Audit Committee review the Financial Reporting System (FRS) reports on a monthly basis? <i>Review committee minutes/reports for evidence of review of FRS reports.</i>			
— GENERAL REVIEW —		YES	NO	N/A
3.	Did the Lodge take appropriate action on the suggestions or recommendations made by the Area Member of the Grand Lodge Auditing and Accounting Committee? <i>Review documents or changes made that are specific to the recommendation.</i>			
4.	Does the Lodge use, and is the accounting system set up with, the "Grand Lodge Chart of Accounts"? <i>Ask for a copy of the Chart of Account list from the Lodge's accounting software. If more than one Corporation, ask for a copy of each corporation's Chart of Accounts.</i>			
5.	Were all entities of the Lodge, club, dining room, health room, swimming pool, golf course, bingo, etc. included in the Combined Balance Sheet? <i>Review the Chart of Accounts for the Lodge. It should have all the Lodge's activities included. If more than one "company" comprises the Lodge's activities, ask why and note in report to State Sponsor.</i>			
6.	Are budgets prepared for each entity (Lodge, club, dining room, health room, swimming pool, golf course, bingo, etc.)? <i>Ask for copy of the Budget Report from the accounting software. If no software package used, obtain copy of budget presented to the Lodge.</i>			
7.	Did all separate corporations have budgets prepared with supporting Balance Sheets and P&Ls? <i>Ask for copy of the Budget Report from the accounting software. If no software package used, obtain copy of budget presented to the Lodge.</i>			
8.	Was the financial data for the separate corporation submitted to the Financial Reporting System? <i>Ask for FRS Corporation Lodge number and financial data.</i>			
9.	What bookkeeping system does the lodge use? QuickBooks <input type="checkbox"/> Sage/Peachtree <input type="checkbox"/> Other <input type="checkbox"/> <i>Confirm software manufacture.</i>			
10.	Are postings performed currently and cash receipts records current? <i>Review the accounting system for dates of the most recent postings. In a computerized system review a Year to Date Profit and Loss Report and drill down on the Key Revenue Lines (Member Dues, Bar Sales, etc.)</i>			
11.	Are regular monthly financial reports or statements reported to the membership? <i>Review meeting minutes and report(s) submitted. Obtain copy of most recent Treasurer's report. Review its content. Does it seem reasonable and provide sufficient detail about the Lodges activities.</i>			
12.	Do monthly financial statements include a budget comparison? <i>If not, explain on last page what action is taken to compare actual revenue and expenses to budgeted amounts.</i> <i>Review the monthly report for budget comparisons.</i>			
13.	Are expenditures, which are not in the budget, cleared through the Board of Trustees before being presented to the membership? (Sec. 12.070) <i>Review Board of Directors/Trustees meeting minutes for inclusion. Review meeting minutes for vote of membership.</i>			
14.	Does the Exalted Ruler know that all expenditures not covered by the budget have to be presented to the Board of Trustees first, and then to the membership? <i>Inquire of the Exalted Ruler.</i>			
15.	Is there evidence that decisions are made to adjust operations in order to prevent year-end losses? <i>Review minutes of Board of Directors/Trustees and Lodge meeting minute for modifications to the Budget.</i>			
16.	Are 941 and 940 and state payroll reports and payments current? <i>Review latest Form 941 and review receipts covering the depositing of the Form 940 funds.</i>			
17.	Are all Business/Occupation and Sales Tax Reports and payments current? <i>Review the latest monthly or quarterly returns as filed.</i>			

## EXHIBIT E-2

18.	Are all property tax reports and payments current (where applicable)? <b>Review Year to Date Profit and Loss statement. Review outstanding Account Payable.</b>			
19.	Do W2's balance with 941 reports? <b>Review Form W3 (summary report for the W2 forms filed) and the calendar year Forms 941. Do the totals agree?</b>			
20.	Are all 1099's reporting current? <b>Review process the Lodge uses for determining the issuance of a Form 1099. Employees and Officers are not contract workers.</b>			
21.	Review signed agreement for Form 990 preparer for the current fiscal year. Does agreement include due date prior to August 1st? <b>Review contract for compliance.</b>			
22.	Have tax forms 990 and 990-T been filed and are they current? <b>Review mailing dates for both forms. Obtain a copy of the signed agreement for DD files.</b>			
23.	Are bank reconciliations and investment reconciliations performed monthly and current? <b>Review the latest reconciliations. Do they agree with the reports obtained? If not current inquire as to why.</b>			
24.	Are balances in each account kept to a reasonable maximum amount? <b>Review the cash balances in the Lodge's bank accounts. Do any exceed the current FDIC maximums?</b>			
25.	Are proper payroll taxes being paid on all employees? <b>Review payroll reports and compare to the Form 941. Are all paid Officers included? Are there any payments to the Secretary or Treasurer other than expense reimbursements that are not included in the payroll reports? If so, take note and include in the report to the State Sponsor.</b>			
26.	Are tip records maintained? <b>Review the tip reports kept on file by the Lodge.</b>			
<b>— TRUSTEE AND CLUB MANAGEMENT —</b>		<b>YES</b>	<b>NO</b>	<b>N/A</b>
27.	Do the Trustees have a current inventory of fixed assets? <b>Obtain copy and review details. This should include original cost, accumulated depreciation and remaining balance.</b>			
28.	If the Lodge has investment funds (stocks, bonds, CD's), does it appear that they are well-managed by the Trustees with no recent significant losses? <b>Obtain copy of most recent account statement. Review results for annual returns, reasonableness of investment fees, etc.</b>			
29.	Is the interest from investment accounts posted to the books of record on a current/quarterly basis? <b>Review the Profit and Loss statement and review for inclusion of these amounts.</b>			
30.	In reviewing the records of cash overages/shortages (club, dining room, etc.), does the Lodge have an adequate policy for handling cash shortages? <b>Obtain the policy, is it being implemented? Review the account details for the maximum overage and shortages. Are they reasonable? Obtain explanation of significant ones.</b>			
31.	Is a voucher system used as authorization to pay bills for the Lodge and the club? <b>Review the voucher system. Review actual invoices processed for evidence of the system being used.</b>			
32.	Are vouchers signed by the Exalted Ruler and Secretary as required by Section 12.060 of the Statutes? <b>Select random sample of vouchers and review for the appropriate signatures.</b>			
33.	After the ER and Secretary approve vouchers, are all bills then presented to the Board of Directors or Lodge Trustees for review and approval? ( <b>NOTE: ALL bills are to be vouchered, including recurring expenses such as utilities, mortgage, etc.</b> ) <b>Review the Board of Directors/Trustees meeting minutes. Are the reviews noted?</b>			
34.	Are all bills read at the Lodge meeting and approved by the membership? <b>Review the Lodge meeting minutes for evidence of detailed reading of the bills. Review process for Lodge members being informed of the details if not read in detail at the meeting.</b>			
35.	Does the Chairman of the Club Management body review all club-related bills before they go to the Lodge Secretary? <b>Review a sample of club bills for indication of Club Manager/House Committee approvals.</b>			
36.	Are inventories taken by individuals other than the bartenders, steward or chef? <b>Review inventory reports and signatures of those involved.</b>			

## EXHIBIT E-3

<b>37.</b>	<p>a. Are register tapes checked daily against cash turned in, by someone other than the cashier or bartender?  <b>Review process for cash reconciliations to register tapes. Who is involved and where are the records kept?</b></p>			
	<p>b. Are tapes/receipts turned over to the Lodge bookkeeper?</p>			
<b>38.</b>	<p>Does the Club Management body recap all club-related revenues and disbursements monthly?  <b>This should be part of the monthly financial reporting. Review the Profit and Loss report.</b></p>			
<b>39.</b>	<p>When was the last date insurance was reviewed? _____  <b>Review the Board of Directors/Trustees meeting minutes.</b></p>			
<b>40.</b>	<p>The insurance review was made by the Board of Trustees and found: Adequate <input type="checkbox"/> Inadequate <input type="checkbox"/>  <b>Review the Board of Directors/Trustees meeting minutes.</b></p>			
<b>41.</b>	<p>Has the Lodge obtained free appraisal from Grand Lodge Insurance Department? Yes <input type="checkbox"/> No <input type="checkbox"/>  <b>If yes then obtain/review copy of the report.</b></p>			
	<p>Does the Lodge carry any other voluntary insurance programs?  <b>Review the policies.</b></p>			
<b>42.</b>	<p>a. Directors and Officers/Employment Practices Yes <input type="checkbox"/> No <input type="checkbox"/></p>			
	<p>b. Workers Compensation/Volunteer Coverage Yes <input type="checkbox"/> No <input type="checkbox"/></p>			
	<p>c. Automobile insurance Yes <input type="checkbox"/> No <input type="checkbox"/></p>			
	<p>d. Other insurance: _____ Type: _____</p>			
<b>— SECRETARY REVIEW —</b>		<b>YES</b>	<b>NO</b>	<b>N/A</b>
<b>43.</b>	<p>Are all funds submitted directly to the Secretary? (This includes funds from all Lodge Committees, House Operations, Refunds, Bank Transfers, etc.)  <b>Inquire of the Secretary/Treasurer/Club Manager/House Committee and Other Officers how cash is turned in.</b></p>			
<b>44.</b>	<p>Are all funds entered into the cash receipts book? (If not, explain on last page)  <b>Review Cash Receipts book.</b></p>			
<b>45.</b>	<p>Does the Secretary issue a receipt for all funds submitted to him/her?  <b>Review receipts issued.</b></p>			
<b>46.</b>	<p>Does the Secretary submit funds to the Treasurer on a timely basis?  <b>Review process and documentation of cash turned over.</b></p>			
<b>47.</b>	<p>Does the Secretary, when submitting funds, designate the accounts affected?  <b>Review documentation submitted with the funds.</b></p>			
<b>48.</b>	<p>Does the Secretary properly report, in detail, "Receipts of the Session" at the Lodge meetings – using the Cash records as the basis for the data?  <b>Review meeting minutes for details included.</b></p>			
<b>49.</b>	<p>When the Secretary receives any cash, does he make the proper entries in his cash records, designating what/where the cash is from?  <b>Review process Secretary uses when receiving cash.</b></p>			
<b>50.</b>	<p>Does the Secretary receive all Committee reports with funds and bills attached, in a timely manner? (This includes Lodge Committees, House Committee).  <b>Review a sample of reports submitted for details.</b></p>			
<b>51.</b>	<p>a. Is a gross income and expense report for each fundraising or special event provided by the Committee Chairperson?  <b>Review reports submitted and dates submitted.</b></p>			
	<p>b. Is it reported within two weeks after each event?  <b>Review reports submitted and dates submitted.</b></p>			
<b>52.</b>	<p>Do the various committees understand that they are not to make any cash payments (will be done through the Voucher System)?  <b>Inquire of the Committee Chairs and Secretary.</b></p>			
<b>53.</b>	<p>Are these reports reconciled by the Secretary or Treasurer?  <b>Review the retained reports.</b></p>			
<b>54.</b>	<p>Are the reports retained by the Secretary for use in conducting the annual audit, and available for next year's committee?  <b>Review the retained reports.</b></p>			

## EXHIBIT E-4

	Review and verify all employee personnel records for: <b>Review sample of Employee files for all documents.</b>			
55.	a. Are I-9 Forms complete with Driver's License, Social Security Card and Resident Alien card if necessary?			
	b. Verify that all employees have signed the Harassment Policy?			
	c. Confidentiality Agreement signed?			
	d. At Will Employment Agreement (where applicable)?			
56.	Have the Lodge Officers and House Committee members signed the Harassment Policy? <b>Review signed forms.</b>			
57.	Does the Lodge retain employment tax records for four (4) years and income tax returns and records for three (3) years? <b>Review record retention with the Secretary.</b>			
58.	Does the Secretary maintain security of all records (G.L.S. Section 16.110)? <b>Review procedures and process with the Secretary.</b>			
59.	Review and verify that Restricted Fund Records are complete and funds are being disbursed to the appropriate recipients. <b>Use Profit and Loss report and obtain a sample of bills expensed against the restricted funds.</b>			
60.	Is the dues data posted properly, and on a current basis, to the individual Membership Records? (Whether manual or computerized system) <b>Review membership records in CLMS Whether manual or computerized system.</b>			
61.	Is the dues information posted correctly to the Secretary's Cash Receipts Book? <b>Review CLMS report of dues paid to postings in accounting system.</b>			
62.	Does the House Committee submit proper records to the Secretary related to bar operations (Register tapes, proper allocation of all register readings, etc.)? <b>Obtain and review the records submitted by the House Committee.</b>			
<b>— TREASURER REVIEW —</b>		<b>YES</b>	<b>NO</b>	<b>N/A</b>
63.	Does the Lodge Treasurer serve as Treasurer of all Committees regardless of what committee is involved? <b>Review with Treasurer. Ask to see all checkbooks for Lodge's bank accounts. Review signatures on cancelled checks.</b>			
64.	Does the Lodge Treasurer sign all checks for all accounts as required by Section 12.060 of the Statutes? <b>Review signatures on sample of cancelled checks.</b>			
65.	Does the Treasurer issue a receipt to the Secretary for all cash receipts received? <b>Review samples of receipts issued.</b>			
66.	Does the Treasurer maintain the books of record; Cash Receipts – Disbursement Journal and General Ledger? <b>Review who maintains accounting system if computerized. At a minimum the Treasurer should prepare his own reports from the system.</b>			
67.	Are the receipts, and disbursements for the year, along with the budget comparison presented to the Trustees (or budget committee), in Chart of Accounts order, for the budget preparation? <b>Review reports prepared for account number inclusion</b>			
68.	Do revenues from the following entries compare with source document and code number of the Chart of Accounts and are they posted properly? <b>For items a through g select a random sample of the reports and/or receipts and verify the amounts posted to the Lodge's accounting system.</b>			
69.	Have the cash receipts and cash disbursements been posted in a current manner, and to the proper accounts? <b>Review the accounting system for last posting dates.</b>			
70.	Are separate controls set up for Unrelated Income activities and Restricted accounts? <b>Review accounting reports for use of both Unrelated Business Income (UBI) and Restricted Fund accounts.</b>			
71.	Do revenues from the following entries compare with source document and code number of the Chart of Accounts and are they posted properly? <b>Review accounting reports for posting of interest in a current period.</b>			
	a. Receipts from each fund-raising event, special or catered affair?			
	b. Rental of Real Estate or facilities?			

## EXHIBIT E-5

	c. Daily Bar & Lounge receipts?			
	d. Daily dining Room Receipts?			
	e. Receipts from Bingo and or Charitable Gaming?			
	f. Receipts from Entertainment Machines?			
	g. Other business activities (Swimming Pool, Golf, Snack Bar, etc.)?			
72.	Do the deposits reconcile with both the Secretary and Treasurer's receipts? <b>Compare Bank Deposit records to both listings.</b>			
73.	Was the Cash Receipts Journal correctly totaled and balanced? <b>Review manual records if used. Review accounting package for unposted/reconciling items.</b>			
74.	Were entries from the cash journals correctly posted to the General Ledger? <b>Review manual records. This is automatic in a computerized system.</b>			
75.	Trace revenues entry to the General Ledger, to the entry in the Cash Journal, and to the bank deposit slip; was each entry correct? <b>Review the manual accounting records. Not applicable to a computerized system.</b>			
76.	Do check amounts agree with invoices? <b>Select sample of paid bills and review invoice amounts to check amounts.</b>			
77.	Were the latest monthly Cash Disbursement Journals properly posted to the General Ledger? <b>Review the manual accounting records. Not applicable to a computerized system.</b>			
78.	Were the statements from each bank or Depository reconciled monthly? <b>Obtain the latest reconciliations and review dates completed with statement date.</b>			
79.	Were all tax payments, payroll, sales, etc., paid when due? (Note section on taxes) <b>Review a sample of tax forms filed and payment records for each.</b>			
80.	Are the Lodge records maintained utilizing the Uniform Chart of Accounts as required by Section 13.040? <b>Review all accounting records for use of the Chart of Accounts.</b>			

# EXHIBIT F

## CHECK SHEET FOR LODGE OF ITEMS REQUIRED FOR DISTRICT DEPUTY VISIT (To be completed and retained by the DISTRICT DEPUTY)

LODGE NAME and NUMBER: \_\_\_\_\_ DATE: \_\_\_\_\_

### **YES NO ► I WILL WANT TO SEE IF YOU CAN ACCESS THESE PUBLICATIONS AT ELKS.ORG:**

- |       |       |   |
|-------|-------|---|
| _____ | _____ | 1. Accident/Claim Prevention Manual — Code 513100 — {Seventh Edition; April 2017} *   |
| _____ | _____ | 2. Americanism Manual — Code 512000 — {March 2013} *  |
| _____ | _____ | 3. Auditing and Accounting Manual — Code 510100 — {February 2021} *   |
| _____ | _____ | 4. Discrimination and Harassment Guide — Code 510900 — {December 2014} *  |
| _____ | _____ | 5. Drug Awareness Manual — Code DAP125 — {August 2017 — CD available at <a href="http://elks.org/resources/dap/">http://elks.org/resources/dap/</a> }               |
| _____ | _____ | 6. Elks National Veterans Service Commission Manual — Code 513500 — {August 2019} *   |
| _____ | _____ | 7. Exalted Rulers, Lodge Officers and Committee Members Manual — Code 510500 — {March 2019} *   |
| _____ | _____ | 8. Financial Reporting System [FRS] Manual — Code FRS — {July 2020} *   |
| _____ | _____ | 9. Government Relations Manual — Code 511000 — {August 2015} *  |
| _____ | _____ | 10. Investigation/Interview Committee Manual — Code 510200 — {November 2014} *  |
| _____ | _____ | 11. Liability Insurance Program Manual — Code 513000 — {April 2021} *   |
| _____ | _____ | 12. Lodge Activities Manual — Code 510300 — {March 2013} *  |
| _____ | _____ | 13. Manual On Protocol — Code 510600 — {February 2018} *  |
| _____ | _____ | 14. Membership Guide (Virtual) — <a href="https://virtualmanuals.elks.org/membership-guide/">https://virtualmanuals.elks.org/membership-guide/</a> *                |
| _____ | _____ | 15. PR and Membership Marketing Guide (Virtual) — <a href="https://virtualmanuals.elks.org/marketing-guide/">https://virtualmanuals.elks.org/marketing-guide/</a> * |
| _____ | _____ | 16. Ritual of Local Lodges — Code 511500 — {October 2017} *   |
| _____ | _____ | 17. Rituals of Special Services — Code 511601 — {April 2018} *  |
| _____ | _____ | 18. Ritualistic Contest Manual — Code 519900 — {October 2019} *   |
| _____ | _____ | 19. Secretary's Manual [Elks Lodge] — Code 510800 — {June 2020} *   |
| _____ | _____ | 20. Youth Activities Program Manual — Code 512100 — {March 2019} *  |
| _____ | _____ | 21. Youth Supervision Guide — Code 512200 — {July 2006} *   |

### **YES NO ► I WILL WANT TO SEE THESE PUBLICATIONS:**

- |       |       |  |
|-------|-------|--|
| _____ | _____ | 1. Annotated Statutes — Code 520100 — {Latest Edition—February 2021} *   |
| _____ | _____ | 2. Local Lodge Directory — Code 553700 — {2020-2021 Edition}   |
| _____ | _____ | 3. Grand Lodge and State Associations Directory — Code 553800 — {2020-2021 Edition} *  |
| _____ | _____ | 4. Grand Lodge Proceedings — Code 511400 — {2020-2021 Edition—Baltimore, MD}   |
| _____ | _____ | 5. Grand Lodge Program Booklet (2021/2022) — Code 514000 — {July 2021} *   |
| _____ | _____ | 6. History of the Order, Vol. 1 and 2 — Code 511300 — {1992 and 2008}  |
| _____ | _____ | 7. Orientation DVD — Code 533300 — {2015 — <a href="https://www.elks.org/grandlodge/membership/orientation.cfm">https://www.elks.org/grandlodge/membership/orientation.cfm</a> } * |
| _____ | _____ | 8. Leadership Training Booklets (set of 5) — Code 511900   |
| _____ | _____ | 9. Property Plus Program Guide — {April 2021-2022} *   |
| _____ | _____ | 10. Robert's Rules of Order (Parliamentary Procedures at a Glance) — Code 511700   |
| _____ | _____ | 11. Charity Records Workbook — Code 511100 — {March 2021} *  |
| _____ | _____ | 12. Constitution and Statutes — Code 520200 (sufficient supply for membership) {2020-2021 Edition}   |
| _____ | _____ | 13. What It Means To Be An Elk (Candidate Booklet) — Code 511200 (sufficient supply for membership) {March 2009}   |

### **YES NO ► I WILL WANT A COPY OF, OR TO EXAMINE:**

- |       |       |   |
|-------|-------|---|
| _____ | _____ | 1. Visitors Register — Code 553400  |
| _____ | _____ | 2. Lodge Charter displayed (or Dispensation, if Charter not yet issued)   |
| _____ | _____ | 3. Judiciary-approved Lodge By-Laws (sufficient supply for membership)  |
| _____ | _____ | 4. Judiciary-approved House Rules (sufficient supply for membership)  |
| _____ | _____ | 5. Seal of the Lodge  |
| _____ | _____ | 6. Annual Lodge Budget as adopted by the Lodge  |
| _____ | _____ | 7. Club Managing Body Budgets (Club, Dining Room, Health Room, Swimming Pool & Golf Course) as adopted by the Lodge.  |
| _____ | _____ | 8. Detailed record of Charity Fund income, expenses, balance and plans  |
| _____ | _____ | 9. Minute Book of proceedings of the Lodge  |
| _____ | _____ | 10. Ledger containing the name of each member, birth place, etc.  |
| _____ | _____ | 11. Alphabetical list of expulsions, suspensions, and rejections  |
| _____ | _____ | 12. Account books to clearly present receipts and accounts of the Secretary and Treasurer and general financial and other transactions of the Lodge and Club, or any facility operated by them. |
| _____ | _____ | 13. Charity Records Workbook with up-to-date entries  |
| _____ | _____ | 14. Forum Box — Code 532300   |
| _____ | _____ | 15. Minutes of P.E.R. Association meetings  |
| _____ | _____ | 16. Minutes of Board of Trustees' meetings  |
| _____ | _____ | 17. Minutes of Club Managing Body meetings  |
| _____ | _____ | 18. Minutes of meetings of corporations connected with the Lodge  |
| _____ | _____ | 19. Self-Inspection Checklist of accident prevention manager.   |

\* Denotes manuals available online

# EXHIBIT G-1



## The Benevolent and Protective Order of Elks


[Elks Home](#) > [Members Area](#) > [DD Visits](#) >

### Report of Visit of District Deputy Report Year: 2020/2021

Lodge:   
District:   
ER:   
Secretary:

**Please file 2021-22 DD Visit Reports**  
at <http://www.elks.org/members/dds/ddvisitation-form.cfm>. The DD Visit Report shown here for 2020/21 is for demonstration purposes only. Thanks!

#### 1. Date of Visit

Date of Visit:   (mm/dd/yyyy)  
Number of Members Present:   
Average Meeting Attendance:

#### 2. Membership

Year ending March 31:	2017	2018	2019	2020	Current
<b>Members:</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>A.</b> Is the Lodge using the Membership Program and Planning Manual? <input type="radio"/> Yes <input type="radio"/> No					
<b>B.</b> Does the lodge have a functioning membership management team? <input type="radio"/> Yes <input type="radio"/> No					
<b>C.</b> Are new members properly orientated using the video program supplied by the Grand Lodge? (Sec. 13.022(c)) <input type="radio"/> Yes <input type="radio"/> No					
<b>D.</b> Does the Lapsation Committee meet and report as required? (Sec. 13.022(e)) <input type="radio"/> Yes <input type="radio"/> No					
<b>E.</b> Does the lodge have an active "Stray Elks" program? <input type="radio"/> Yes <input type="radio"/> No					
<b>F.</b> Does the lodge have a functioning Investigating Committee? (Sec. 13.022(d)) <input type="radio"/> Yes <input type="radio"/> No					
<b>G.</b> Does the Secretary bill delinquent members for dues regularly? (Sec. 12.050) <input type="radio"/> Yes <input type="radio"/> No					

#### 3. National Foundation Statistics

Year ending March 31:	2018	2019	2020	Current
<b>A1. Total Giving:</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>A2. Per-Capita Giving:</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>B.</b> Does Lodge maintain a recognition board listing names of Foundation supporters? <input type="radio"/> Yes <input type="radio"/> No				

#### 4. Lodge Operation

**A.** Are all required books, records and minutes of Secretary and Treasurer properly kept? (Sec. 16.110) ☐ Yes ☐ No



## EXHIBIT G-2

**B.** Approval date of General Revision of Lodge By-Laws (Sec. 17.060):

**C.** Are all Committees required by the Laws of the Order maintained in the Chicago Lodge Membership System? (Sec. 13.020)

☐ Yes ☐ No

**D1.** Annual Salary of Secretary:

**D2.** Annual Salary of Treasurer:

**E1.** Initiation Fee:

**E2.** Annual Dues:

**E3.** Reinstatement Fee:

**F.** Do all Officers and Club Managers know procedure to promptly report possible claims?

☐ Yes ☐ No

**G.** Does the Accident Prevention manager (Trustee Sec. 12.070) use the Grand Lodge self-inspection checklist?

☐ Yes ☐ No

### H1. Mandatory Grand Lodge Insurance Programs (Sec. 4.231 & 4.232):

**A. Grand Lodge Master Liability Program** (provides general/liquor liability coverage; premium paid as part of annual per capita—no audit required and no additional premium or deductible due).

**B. Grand Lodge Property Plus Program (premium billed directly to Lodge):**

*Includes Crime Coverage, which satisfies the bonding requirements under the Statutes.*

*For items 1-4 below, refer to certificate of coverage included in Aon's April 1st renewal packet:*

**1.** Building coverage limit:

**2.** Business Personal Property/Contents coverage limit:

**3.** Business Income Coverage limit:

**4.** Deductible:

**5.** Date Lodge Building(s) were last appraised to assess building replacement costs (leave blank if n/a):



(mm/dd/yyyy)

### H2. Voluntary Grand Lodge Insurance Programs:

(Grand Lodges recommends that all Lodges obtain coverages listed below)

**A.** Has the lodge obtained **Directors & Officers Coverage** to provide defense for allegations of wrongful acts by officers, directors, or members in the management of the Local Lodge?

[select one]



**A-1. If other than Chubb**, what is the name of the carrier selected to provide Directors and Officers Coverage?:

**B.** Has the lodge obtained **Workers Compensation Coverage** ? (Even if Lodges have no regular employees, such coverage is the exclusive remedy for occupational injury claims--accident policies are insufficient).

[select one]



**B-1. If other than Lockton**, what is the name of the carrier selected to provide Workers Compensation Coverage?:

**I.** Is all Lodge-owned property used by the Lodge in its operation?

☐ Yes ☐ No

**J.** Does Lodge support the Americanism program? (Sec. 13.022(a))

☐ Yes ☐ No

**K.** Does Lodge support the Drug Awareness program? (Sec. 13.021(a))

☐ Yes ☐ No

**L.** Does Lodge participate in the Hoop Shoot® Contest? (Sec. 13.021(a))

☐ Yes ☐ No

**M.** Does Lodge conduct Elks Memorial Day Services? (Sec. 2.020/13.022(g))

☐ Yes ☐ No

**N.** Does Lodge conduct Flag Day Services? (Sec. 2.030/13.0226)

☐ Yes ☐ No

**O.** How do you rate the Lodge's community involvement beyond the statutorily required programs, which include those listed in J-N?

[select one] ▼

**P.** Is there an active Past Exalted Rulers Association? (Sec. 13.190)

☐ Yes ☐ No

## EXHIBIT G-3

- Q.** Did you examine minutes of Past Exalted Rulers Association meetings? ☐ Yes ☐ No
- R.** Is the Lodge maintaining charity records on the Grand Lodge website of volunteer, youth, charitable and community service programs? ☐ Yes ☐ No
- S.** Has each Lodge Officer read and understood his duties as described in the Exalted Ruler, Lodge Officers & Committee members Manual? ☐ Yes ☐ No
- T1.** Were all regular lodge meetings held prior to the District Deputy visit? ☐ Yes ☐ No
- T2.** If not all meetings were held, how many were missing?  ▼
- U.** Was dispensation granted by the District Deputy for a missed lodge meeting? ☐ Yes ☐ No
- V.** Does Lodge participate in the Antlers Program? (Article III, Sec. 18) ☐ Yes ☐ No
- W.** Did you meet with the Lodge membership Chair and committee to discuss the Lodge membership program and review committee minutes? ☐ Yes ☐ No

Please write a concise report of the Lodge membership program:

### 5. Lodge Officers

- Does the lodge have a full slate of elected Officers for the current year? ☐ Yes ☐ No
- Number of Meetings held since April 1st:  ▼
- Exalted Ruler Meetings Missed:  ▼
- Leading Knight Meetings Missed:  ▼
- Loyal Knight Meetings Missed:  ▼
- Lecturing Knight Meetings Missed:  ▼
- Secretary Meetings Missed:  ▼
- Treasurer Meetings Missed:  ▼
- Tiler Meetings Missed:  ▼
- Esquire Meetings Missed:  ▼
- Chaplain Meetings Missed:  ▼
- Inner Guard Meetings Missed:  ▼
- Organist Meetings Missed:  ▼
- Vocalist Meetings Missed:  ▼
- 1-year Trustee Meetings Missed:  ▼
- 2-year Trustee Meetings Missed:  ▼
- 3-year Trustee Meetings Missed:  ▼
- 4-year Trustee Meetings Missed:  ▼
- 5-year Trustee Meetings Missed:  ▼
- Reasons for undue absences at meetings:

## EXHIBIT G-4

### 6. Club Operations (Sec. 16.040)

**A. Method of Club Management:**

- ☐ Four Chair Officers & Trustees  
☐ Trustees Only  
☐ House Committee  
☐ Board of Directors of the Home Corporation  
☐ Lodge does not have a Club

**B. Did you examine the Club budget?**

☐ Yes ☐ No

**C. Are expenditures within budget?**

☐ Yes ☐ No

**D. Does club management body check if expenditures are within budget?**

☐ Yes ☐ No

**E. Does club management body hold regular meetings?**

☐ Yes ☐ No

**F. Did you examine minutes of the clubs managing body?**

☐ Yes ☐ No

**G. Did you examine the monthly financial statement of the club?**

☐ Yes ☐ No

**H. Are club rooms vacated and closed during sessions of the Lodge (Sec. 16.090)?**

☐ Yes ☐ No

**I. Date of approval of General Revision of the Lodge House Rules (Sec. 17.060)**

**J. Does the club management body report monthly at Lodge meetings?**

☐ Yes ☐ No

### 7. Lodge Operations (Sec. 12.070)

**A. Is the Lodge incorporated?**

☐ Yes ☐ No

**B. Date Incorporated:**



(mm/dd/yyyy)

**C. Method of Lodge Management:**

☐ Board of Trustees ☐ Board of Directors

**D. Do the Trustees/Board of Directors hold regular monthly meetings?**

☐ Yes ☐ No

**E. Did you examine the minutes of the Trustees/Board of Directors meetings?**

☐ Yes ☐ No

**F. Did you examine the Lodge budget?**

☐ Yes ☐ No

**G. Are the expenditures within the lodge budget?**

☐ Yes ☐ No

**H. Do the Trustees/Board of Directors check to see if the Lodge expenditures are within the Lodge budget?**

☐ Yes ☐ No

**I. Did you examine the monthly financial statement of the lodge?**

☐ Yes ☐ No

**J. Is the lodge building:**

☐ Owned by the Lodge ☐ Home Corporation ☐ Rented facility

**K. What is the combined indebtedness of the Lodge?**

### 8. Ritual Performance (OPTIONAL)

**Did you witness initiation?**

☐ Yes ☐ No

## EXHIBIT G-5

---

Impressively done from memory?

☐ Yes ☐ No

Number of candidates initiated?

Was the opening and closing done impressively?

☐ Yes ☐ No

### 9. IMPORTANT: ADDITIONAL INFORMATION

If there is a "NO" answer, give a complete explanation:

Concise report as to your general observations and specific recommendations  
as to the problems of the lodge and club:

User Type: DD

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Server: www

## Submitting Your District Deputy Reports Online via Elks.org

Congratulations on being selected as a District Deputy Grand Exalted Ruler of the Benevolent and Protective Order of Elks.

An important part of your responsibilities as District Deputy will be scheduling your lodge visitations, and then submitting a series of online reports within seven days of each visit.

You'll also be expected to schedule and report on the two District Deputy clinics you'll be holding on behalf of the lodges in your district, and a new Session Attendance Report for the Grand Lodge Convention.

All of these reports must be submitted via Elks.org, and this brief instruction sheet is designed to help you get started.

### Step 1: Register for an Elks.org User Name and Password

If you already have an elks.org account, you can skip this step. The system will automatically recognize you as a District Deputy when you sign in, and will assign you the appropriate access privileges. You do not need to register for a separate account.

If you do not yet have an elks.org account, open your web browser and visit [www.elks.org](http://www.elks.org). Click the "Register" link in the upper right-hand corner of the site:



Read over the Terms of Service, and then click the link labeled,

**"I accept these terms please proceed to registration."**

You'll be taken to the Elks.org Online Registration Form:

<https://www.elks.org/secure/members/registration.cfm>

where you'll be asked to supply your name, lodge number, membership number, and email address. You'll also be asked to select the user name and password you'd like to use on elks.org. Please select a password that's easy to remember, but note that your password must conform to the following guidelines:

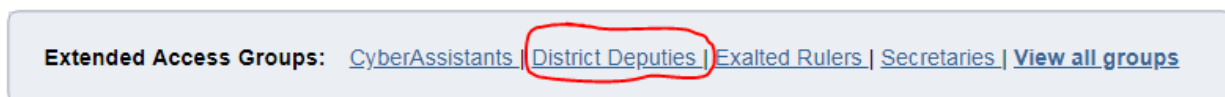
- Passwords must be at least 8 characters in length.
- Passwords must have at least one lowercase letter [a-z]
- Passwords must have at least one UPPERCASE letter [A-Z]
- Passwords must contain at least one number [0-9]
- You may use special characters like !, \$ and &

### Step 2: Visit the District Deputy area of Elks.org

On the elks.org home page, click the "Members Only" link from the Main Menu:



You'll be taken to the Members Only home page. From there, click the "Extended Access" link labeled, **District Deputies**:



You'll be taken to the District Deputy home page:

<http://www.elks.org/Members/DDs/>

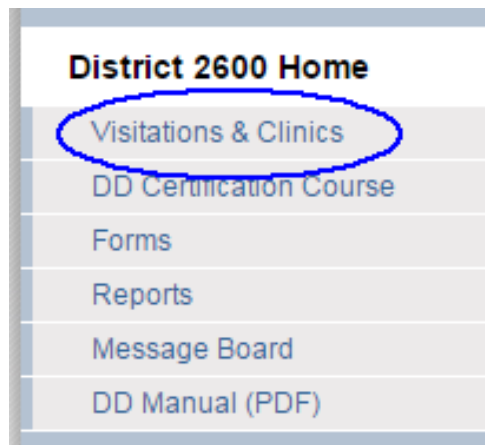
On the District Deputy home page, you'll usually see a box highlighting any issues of concern specific to the lodges in your district:



Please review this page at least once per week, and take whatever steps are required to resolve these issues.

## Step 3: Submit Your Session Attendance Report

Immediately following the Grand Lodge Convention, you should submit your Session Attendance Report. To get started, click the link labeled, "Visitations & Clinics" from the District Deputy Menu:



To submit your report, click the button labeled, "Create Session Attendance Report:"

### **Grand Lodge Session Attendance Report:**

District 2600 Attendance Report [Create Session Attendance Report](#)

For each Lodge in your district, please indicate the title of the individual representing that lodge, which should be either “Exalted Ruler,” or “Alternative Rep,” and then indicate if they were “Present”, “Absent” or “Excused” for each of the three sessions:

**Grand Lodge Session Attendance Report**

**1. Attendance**

Lodge Name & Number	Title of Representative (ER or Alternate Rep)	Monday	Tuesday	Wednesday
Elgin, IL #737	Exalted Ruler	Present ▼	Present ▼	Present ▼
Chicago Northshore, IL #1316	Exalted Ruler	Present ▼	Present ▼	Present ▼
Brookfield, IL #1510	Exalted Ruler	Present ▼	Present ▼	Present ▼
Des Plaines, IL #1526	Exalted Ruler	Present ▼	Present ▼	Present ▼
Elmhurst, IL #1531	Alternative Rep	Present ▼	Present ▼	Present ▼
Wheaton, IL #2258	Exalted Ruler	Present ▼	Present ▼	Present ▼

Comments:

**Save**

If necessary, you can provide additional information in the “Comments” section, and then click the “Save” button. Note that saving the data records the information so that it can be accessed later, but it does not submit the report to Grand Lodge. When your information is accurate and complete, you can submit to Grand Lodge by clicking the button labeled, “Submit to Grand Lodge:”

**2. Submit to Grand Lodge**

Click **Submit to Grand Lodge** to submit your report to the Grand Lodge. Note that once your report has been submitted, you will not be able to make changes.

**Submit to Grand Lodge**

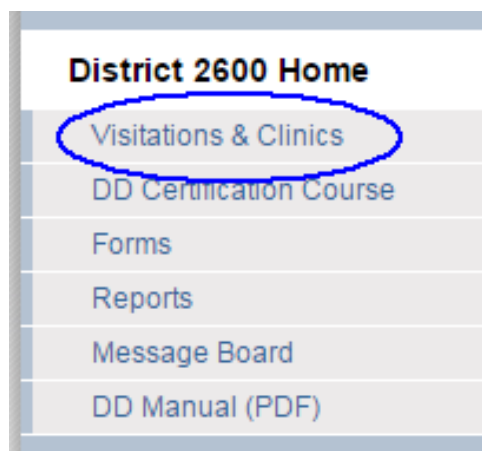
That’s all there is to it. Your report will be delivered automatically to Grand Lodge and to your State Sponsor.



## Step 4: Schedule Your Visits and Clinics

After you've submitted your Session Attendance Report, you should begin scheduling your Lodge Visitations and District Deputy Clinics. **This information should be submitted to Grand Lodge no later than August 15th.**

To get started, click the link labeled, "Visitations & Clinics" from the District Deputy menu:



To schedule a Visit, click the "Schedule Dates" button next to the appropriate lodge:

## Visitation/Clinic Schedule

Lodge	Visitation Date	Action
Elgin, IL #737	Not Scheduled	<a href="#">Schedule Dates</a>
Woodstock, IL #1043	Not Scheduled	<a href="#">Schedule Dates</a>
Chicago Northshore, IL #1316	Not Scheduled	<a href="#">Schedule Dates</a>
Brookfield, IL #1510	Not Scheduled	<a href="#">Schedule Dates</a>
Des Plaines, IL #1526	Not Scheduled	<a href="#">Schedule Dates</a>
Elmhurst, IL #1531	Not Scheduled	<a href="#">Schedule Dates</a>
Wheaton, IL #2258	Not Scheduled	<a href="#">Schedule Dates</a>
Host Lodge	August/Sept. Clinic Date	Action
N/A	Not Scheduled	<a href="#">Schedule Dates</a>
Host Lodge	March/April Clinic Date	Action
N/A	Not Scheduled	<a href="#">Schedule Dates</a>

You'll be prompted to enter the date of your visit:

Brookfield, IL #1510  [Submit](#) [Cancel](#)

Enter the date in mm/dd/yyyy format, and click the “Submit” button. That’s all you need to do. Be sure to submit the scheduled visitation date for each of the lodges in your district.

Your District Deputy Clinics should be scheduled in the same way. For your Clinics you’ll be asked to indicate the Host Lodge as well as the scheduled date:

Host Lodge	August/Sept. Clinic Date	Action
[Select Host Lodge]	<input type="text"/>	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>
[Select Host Lodge]	March/April Clinic Date	Action
Elgin, IL #737	Not Scheduled	<input type="button" value="Schedule Dates"/>
Woodstock, IL #1043		
Chicago Northshore, IL #1316		
Brookfield, IL #1510		
Des Plaines, IL #1526		
Elmhurst, IL #1531		
Wheaton, IL #2258		

Enter the scheduled location and date for both your August/September clinic, and your March/April Clinic. **Remember, if you leave any visits or clinics unscheduled after August 15th, you may hear from your PGER State Sponsor, Special Deputy, or District Leader.**

## Step 5: Submit a Visitation Report

For each of the lodges you visit, you’ll be required to submit a Visitation Report, a Self-Inspection Report, and an Audit Report. To submit your first Visitation Report, click the “Create” button in the “Visitation Reports” column for the appropriate lodge:

Lodge	-- Visitation Reports --	-- Self Inspection Reports --	-- Audit Reports --
Elgin, IL #737	Create	Create	Create
Woodstock, IL #1043	Create	Create	Create
Chicago Northshore, IL #1316	Create	Create	Create
Brookfield, IL #1510	Create	Create	Create
Des Plaines, IL #1526	Create	Create	Create
Elmhurst, IL #1531	Create	Create	Create
Wheaton, IL #2258	Create	Create	Create

For each section of the report, supply the requested information, and then click the “Save” button:

1. Date of Visit

Date of Visit:  (mm/dd/yyyy)

Number of Members Present:

Average Meeting Attendance:

Save

Note that some of the requested fields (such as ENF giving totals) are pre-populated based on information already stored at Grand Lodge. In most situations you should leave those values unchanged:

3. National Foundation Statistics

Year ending March 31:	2014	2015	2016	Current
A1. Total Giving:	\$3,730.00	\$5,005.00	\$5,028.00	\$3,073.00
A2. Per-Capita Giving:	\$28.91	\$40.69	\$44.89	\$25.40

B. Does Lodge maintain a recognition board listing names of Foundation supporters?
☐ Yes ☐ No

Save

Be sure to click the “Save” button at the end of each section so that none of your data gets lost. If you don’t have time to complete your report in one sitting, no problem. As long as your data is saved you can logoff and then resume your work at any time:

Lodge	-- Visitation Reports --	-- Self Inspection Reports --	-- Audit Reports --
Elgin, IL #737	Create	Create	Create
Woodstock, IL #1043	Create	Create	Create
Chicago Northshore, IL #1310	Resume	Create	Create
Brookfield, IL #1510	Create	Create	Create
Des Plaines, IL #1526	Create	Create	Create
Elmhurst, IL #1531	Create	Create	Create
Wheaton, IL #2258	Create	Create	Create

Note that you should supply answers to all questions. If a certain question doesn’t apply or requires clarification, select the response that makes the most sense, and then provide additional information in Section 9:

### 9. IMPORTANT: ADDITIONAL INFORMATION

If there is a "NO" answer, give a complete explanation:



Once you've answered every question, you can submit your report to Grand Lodge by clicking the button at the very bottom of the page labeled, "Submit to Grand Lodge." **Be sure to review all of your answers before you submit, however, because you will not be able to make further changes once your report is submitted.**

### 11. Submit to Grand Lodge

Click **Submit to Grand Lodge** to submit your report to the Grand Lodge. Note that once your report has been submitted, you will not be able to make changes.

Your name:

Upon submission, your report will be saved on the Grand Lodge servers, and will be sent to both you and to your Grand Lodge Sponsor as an email attachment in PDF format. You do not need to mail your report to Grand Lodge, but please check with your PGER Sponsor to be sure that the PDF attachment is sufficient for his records.

If your report does not get delivered to you via email, for some reason, or is accidentally deleted, you can retrieve a copy of your report at any time by clicking the appropriate button on the reporting interface:

Lodge	-- Visitation Reports --	-- Self Inspection Reports --	-- Audit Reports --
Elgin, IL #737	Submitted 10/19/2016 (PDF)	Submitted 10/19/2016 (PDF)	Submitted 10/19/2016 (PDF)
Woodstock, IL #1043	Submitted 12/01/2016 (PDF)	Submitted 09/29/2016 (PDF)	Submitted 09/29/2016 (PDF)
Chicago Northshore, IL #1316	Submitted 11/16/2016 (PDF)	Submitted 11/16/2016 (PDF)	Submitted 11/16/2016 (PDF)
Brookfield, IL #1510	Submitted 09/26/2016 (PDF)	Submitted 09/26/2016 (PDF)	Submitted 09/26/2016 (PDF)
Des Plaines, IL #1526	Submitted 12/21/2016 (PDF)	Submitted 09/13/2016 (PDF)	Submitted 09/13/2016 (PDF)
Elmhurst, IL #1531	Submitted 11/30/2016 (PDF)	Submitted 10/27/2016 (PDF)	Submitted 10/27/2016 (PDF)
Wheaton, IL #2258	Submitted 11/21/2016 (PDF)	Submitted 11/18/2016 (PDF)	Submitted 11/22/2016 (PDF)
	-- August/September Clinic --	-- March/April Clinic --	
	Submitted 01/10/2017 (PDF)	Create Second Clinic Report	

Note that you do not need to confirm receipt of your report with the Grand Lodge Webmaster. As long as your report displays as “Submitted” in the reporting interface, you can be assured that your report has been filed successfully.

## 6. Submit a Self-Inspection Report

Self-Inspection Reports are submitted in exactly the same way as Visitation Reports. Click the appropriate button to get started:

Lodge	-- Visitation Reports --	-- Self Inspection Reports --	-- Audit Reports --
Elgin, IL #737	Create	Create	Create
Woodstock, IL #1043	Create	Create	Create
Chicago Northshore, IL #1316	Resume	Create	Create
Brookfield, IL #1510	Create	Create	Create
Des Plaines, IL #1526	Create	Create	Create
Elmhurst, IL #1531	Create	Create	Create
Wheaton, IL #2258	Create	Create	Create
	-- August/September Clinic --	-- March/April Clinic --	
	Create First Clinic Report	Create Second Clinic Report	

For your Self-Inspection report, you’ll be asked to answer each question with “Yes”, “No”, or “N/A”. As with your Visitation Report, please click the “Save” button after each section to make sure that you don’t lose any data:

## 1. Access Roads, Walkways, Parking Areas

- a. Free of debris, cracks, broken pavement ☒ Yes ☐ No ☐ N/A
- b. Different elevations between adjacent walkways provided with guards or well marked ☒ Yes ☐ No ☐ N/A
- c. Walkways flat, well-drained, without holes ☒ Yes ☐ No ☐ N/A
- d. Fences & barricades secured & in good condition ☐ Yes ☐ No ☒ N/A
- e. Pathways and parking areas have adequate lighting ☒ Yes ☐ No ☐ N/A
- f. Walkways have safe clearance from motorized equipment ☒ Yes ☐ No ☐ N/A
- g. Signs indicating "Park at your own risk." ☐ Yes ☒ No ☐ N/A

Save

After you've answered every question, you can also add any additional comments or observations:

## 14. Comments

Comments or observations:

Save

Once your report is complete, you can submit the data to Grand Lodge:

## 16. Submit to Grand Lodge

Click **Submit to Grand Lodge** to submit your report to the Grand Lodge. Note that once your report has been submitted, you will not be able to make changes.

Your name:

Submit to Grand Lodge

Once again, a copy of the report will be emailed to you and to your PGER Sponsor in Adobe PDF format.

## 7. Submit an Audit Report

District Deputy Audit Reports are created in exactly the same way as Visitation and Self-Inspection reports:

Lodge	-- Visitation Reports --	-- Self Inspection Reports --	-- Audit Reports --
Elgin, IL #737	Create	Create	Create
Woodstock, IL #1043	Create	Create	Create
Chicago Northshore, IL #1316	Resume	Create	Create
Brookfield, IL #1510	Create	Create	Create
Des Plaines, IL #1526	Create	Create	Create
Elmhurst, IL #1531	Create	Create	Create
Wheaton, IL #2258	Create	Create	Create

-- August/September Clinic --	-- March/April Clinic --
Create First Clinic Report	Create Second Clinic Report

As with your Self-Inspection report, each question will be answered “Yes”, “No”, or “N/A”:

**Audit Committee Review:**

1. Did the Audit Committee perform their financial reviews in July, October, and January and file a written report with the Lodge as required by Sect. 13.040-i of the Statutes? ☐ Yes ☐ No ☐ N/A
2. Did the Audit Committee engage the Accountant for the Annual Financial Report well in advance of March 31st? ☐ Yes ☐ No ☐ N/A
- Was a signed "Accountant Contract" completed and on file for the year ending March 31st? ☐ Yes ☐ No ☐ N/A
3. Did the Audit Committee deliver the Annual Financial Report to the Lodge by June 15th? ☐ Yes ☐ No ☐ N/A
4. Did the Audit Committee review, sign and send the Annual Financial Report with Transmittal letter to their Grand Lodge Area A & A Committeeman prior to June 30th? ☐ Yes ☐ No ☐ N/A

[Save Report and Continue Work](#)

Note that until you’ve answered (and saved) your answers to every question, the “Submit to Grand Lodge” button will not be activated. Once your report is complete, you can submit to Grand Lodge:

**Submit to Grand Lodge**

Click **Submit to Grand Lodge** to submit your report to the Grand Lodge. Note that once your report has been submitted, you will not be able to make changes.

[Submit to Grand Lodge](#)

As always, upon successful submission your report will be emailed to you and to your PGER Sponsor in Adobe PDF format.

## 8. Submit a Clinic Attendance Report

Upon completion of your August/September Clinic, and then again after your March/April Clinic, you'll be expected to submit a report indicating who was in attendance:

Lodge	-- Visitation Reports --	-- Self Inspection Reports --	-- Audit Reports --
Vicksburg, MS #95	Create	Create	Create
Greenville, MS #148	Create	Create	Create
Canton, MS #458	Create	Create	Create
Greenwood, MS #854	Create	Create	Create
Clarksdale, MS #977	Create	Create	Create
Corinth, MS #2573	Create	Create	Create

-- August/September Clinic --	-- March/April Clinic --
Create First Clinic Report	Create Second Clinic Report

To complete this report, simply indicate the date of your Clinic, the Host Lodge, and the attendance status of the Officers for each of the lodges in your District:

**1. Date of Clinic & Host Lodge**

Date of Clinic: 
Host Lodge:

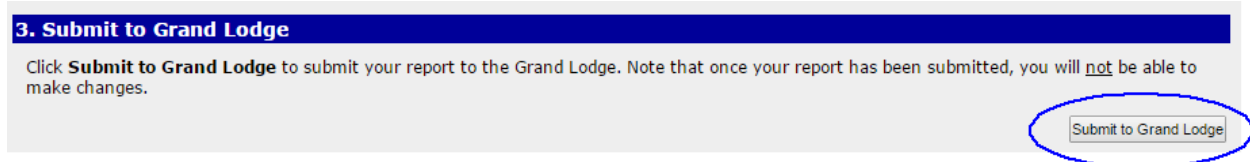
**2. Attendance**

Lodge Name & Number	Exalted Ruler	Leading Knight	Lodge Secretary	Trustee Chairperson	Others Present	Total
Vicksburg, MS #95	Present	Present	Present	Present		4
Greenville, MS #148	Present	Present	Present	Present		4
Canton, MS #458	Present	Present	Present	Present		4
Greenwood, MS #854	Present	Present	Present	Present		4
Clarksdale, MS #977	Present	Present	Present	Present		4
Corinth, MS #2573	Present	Present	Present	Present		4

Comments:



You should also indicate how many others from each lodge were present beyond the required attendees. The report form will automatically calculate the total attendance for each lodge. Add any comments that you'd like to make about the clinic, and then click the "Save" button. Review the data, and then click the "Submit to Grand Lodge" button to file your report:



That's all there is to it. Your report will once again be emailed to you and to your PGER Sponsor in Adobe PDF format.

## 9. Frequently Asked Questions

### **How much time do I have to submit my reports?**

Your Grand Lodge Session Attendance report should be filed as soon as possible following the convention.

You should submit a complete schedule of your visitation dates and clinics no later than August 15th.

Your Visitation, Self-Inspection, Audit and Clinic Attendance Reports should be submitted to Grand Lodge no later than 7 days following the event. Your PGER Sponsor, Special Deputy, and District Leader, if applicable, will be notified about any missing or late reports.

### **I submitted my report to Grand Lodge, but just noticed a mistake. Can I edit the report?**

No, complete reports cannot be edited once they're submitted to Grand Lodge. However, in the event of a serious omission or error, the Grand Lodge webmaster can reopen the report for further revision. Requests should be submitted via email to [webmaster@elks.org](mailto:webmaster@elks.org).

## **DISTRICT DEPUTY'S WORK AND FOLLOW-UP SHEET**

This work sheet is to be used as a Check List and should be retained in your files to assist you in following up on recommendations to your Lodges to determine that proper action has been taken.

If proper action is not taken, notify your Past Grand Exalted Ruler Sponsor(s).

### **It is the District Deputy's duty and responsibility to require that:**

- (a) The Visitor's Register be available at all times;
- (b) The Charter be properly displayed in the Lodge;
- (c) The Lodge Bylaws be up-to-date and approved by the Committee on Judiciary. It is required that a general revision of the Bylaws be made at least once every five years, to keep them in conformity with changes made by the Grand Lodge. If the Bylaws have not been approved in the last five years, a general revision *must* be made. The mere amendment of specific sections is not acceptable.
- (d) Elks Memorial Services be held annually on the first Sunday in December or by permission of the District Deputy on a designated date of the week before or after the first Sunday;
- (e) The Lodge maintain an appropriate Memorial Tablet or Necrology;
- (f) The Lodge hold appropriate Flag Day Services;
- (g) All committees required by Statute be appointed and active;
- (h) The Secretary's and Treasurer's salaries be provided for in the Bylaws;
- (i) A Mediator and a Presiding Justice of the Local Forum be appointed;
- (j) Provisions and procedures of Section 1.210 on a Forum Box be complied with;
- (k) The Lodge have a copy of the Statutes Annotated (*latest reissue*);
- (l) All officers and committee members have copies of appropriate manuals;
- (m) Lodge officers understand and comply with requirements of Sections 14.010-14.020;
- (n) The Secretary knows the assignments of Grand Lodge Trustees and the Judiciary Committee, both listed in the current Grand Lodge and State Associations Directory;
- (o) The Trustees be advised of the requirements of Section 16.050;
- (p) The Trustees be required to hold meetings regularly, keep minutes of their

meetings and perform all duties as required by Section 12.070 — including the establishment of an annual Lodge budget adopted by the Lodge and selection of one of them as Accident Prevention Manager;

- (q) The Club management body be required to hold meetings regularly, keep minutes of their meetings and perform all duties as required by Section 16.040 — including the establishment of an annual Club, Dining Room, Health Room, Swimming Pool and Golf Course budget adopted by the Lodge;
- (r) The Lodge remain compliant with reporting through the Financial Reporting System;
- (s) The Lodge keep a file of Elks Magazines and a copy of the "History of the Order of Elks" (volumes 1 & 2) for Members to read;
- (t) The Lodge have a copy of the Membership Program and Planning Manual and use the Procurement, Orientation and Lapsation sections properly;
- (u) The Lodge have an up-to-date Orientation Program Video which is used properly by the Indoctrination Committee;
- (v) The Lodge have an adequate Lapsation Program and active Lapsation Committee;
- (w) The Lodge have a broad program of charitable, welfare, community and youth activities based on the needs of the community, with participation statistics posted up-to-date in the Charity Records Workbook on file at the Secretary's desk;
- (x) The Lodge have an active Elks National Foundation Committee and support by the Lodge and its individual Members;
- (y) The Lodge Officers understand and comply with the provisions of Section 16.140. The penalty for such solicitations will be invoked;
- (z) The Lodge have an active National Veterans Service Committee and support by the Lodge.

**Lodge Officers should be informed of the importance and necessity of sending the Grand Secretary membership reports within the required time.**

# EXHIBIT J-1

## GUIDE FOR REVIEWS BY LODGE AUDITING & ACCOUNTING COMMITTEE

This guide is for use in conducting reviews specified in Sec. 13.040(i) of the Grand Lodge Statutes. Before proceeding, Committee Members should read and achieve an understanding of the following:

- Sec. 12.050 — Duties of the Secretary
- Sec. 12.060 — Duties of the Treasurer
- Sec. 12.070 — Duties of the Trustees or Board of Directors
- Sec. 16.030 and 16.040 — Budgeting Requirements
- The Grand Lodge Auditing and Accounting Manual (Code 510100)

The Committee should keep in mind that the basic purpose of the review and report to the Lodge are to provide reasonable assurance (1) that cash assets are safeguarded against loss from unauthorized use or disposition; (2) that transactions are executed as intended by the Lodge and recorded in a manner that will promote accurate financial statements; and (3) that each entity utilize the required budget process to control expenditures and prevent year-end losses.

	YES	NO
1. Have Dues and Fees been posted currently by date, name and in the proper account? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
2. Has Interest earned, as noted on bank or depository statements, been entered in the accounting system? . .	<input type="checkbox"/>	<input type="checkbox"/>
3. Do revenues from the following entries compare with source document and account number from the Chart of Accounts? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
<i>a.</i> Receipts from each fund-raising event, special or catered affair? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
<i>b.</i> Rental of Real Estate or facilities? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
<i>c.</i> Daily Bar & Lounge receipts? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
<i>d.</i> Food receipts? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
<i>e.</i> Receipts from Bingo . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
<i>f.</i> Receipts from Entertainment Machines? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
<i>g.</i> Others peculiar to the Lodge (i.e., Swimming Pool, Golf, Snack Bar, etc.). . . . .	<input type="checkbox"/>	<input type="checkbox"/>
4. Does the Secretary receive all monies from all sources? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
5. Are bank deposits made promptly, for safeguarding of cash purposes? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
6. Do the deposits reconcile with Secretary's receipts logs (both received log and Treasurer log)? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
7. Trace revenue entry to the General Ledger and to the bank deposit slip. Was each entry correct? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
8. Count cash on hand for each authorized entity. Did the amount reconcile with the recorded amount? . . .	<input type="checkbox"/>	<input type="checkbox"/>
9. Does cash on hand held by all parties exceed limits of existing Insurance? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>

## EXPENSE RECORD KEEPING

Examine a reasonable number of expense entries against the vouchers or invoices.

10. Is a voucher system used in authorizing expenditures by the Lodge? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
11. Do check amounts agree with invoices? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
12. Was the correct expense account code from the Chart of Accounts entered? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
13. Are all invoices/vouchers marked "Paid" with the date and check number posted thereon? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
14. Were payroll checks computed correctly based on hours worked, taxes withheld? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
15. Is the number of checking accounts kept to a minimum? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>
16. Are all checking accounts interest-bearing? . . . . .	<input type="checkbox"/>	<input type="checkbox"/>

## EXHIBIT J-2

### EXAMINE CASH DISBURSEMENTS

YES NO

17. Select several payments from the latest monthly financial statements. Trace the process through the receipt of the service/product, vouchering of the bill or statement, approval, payment and make sure that it was properly processed and expensed to the correct account. Was each verified and correct? . . . . . ☐ ☐
18. Were the statements from each Bank and Depository and Investment account reconciled monthly? . . . . . ☐ ☐
19. Cash payouts are discouraged. Are they kept to a minimum? . . . . . ☐ ☐
20. Are cash payouts entered correctly in the appropriate Disbursement Journal? . . . . . ☐ ☐

### BUDGET COMPLIANCE

21. Was a proper budget prepared for each entity of the Lodge? . . . . . ☐ ☐
22. Were the budget line items correlated well with the Chart of Accounts? . . . . . ☐ ☐
23. Was the Budget presented to the Lodge and approved by the members present? . . . . . ☐ ☐
24. Are monthly statements prepared and made available to compare with budget? . . . . . ☐ ☐
25. Was an expenditure of any line item in excess of the budgeted amount? . . . . . ☐ ☐
26. If applicable, were expenditures for unbudgeted items or expenditures in excess of the budget first referred to the Trustees or Board of Directors for consideration? . . . . . ☐ ☐
27. Do the Board of Directors or Trustees meet regularly to review the budget comparisons? . . . . . ☐ ☐
28. Do the Board of Directors or Trustees have a complete record of the Fixed Assets of the Lodge? . . . . . ☐ ☐

### TAX COMPLIANCE

29. Examine income-producing activities to determine if there is unrelated business income (sourced from non-member). Are records being kept on that segment of activity for the purpose of filing the Federal Form 990-T Return and any State Return? . . . . . ☐ ☐
30. Are Payroll Taxes withheld on all employees? . . . . . ☐ ☐
31. Has the Lodge paid when due, all payroll, income and employment taxes and filed all required quarterly and annual returns? . . . . . ☐ ☐
32. If contract labor is used, are 1099-NEC or 1099-MISC forms issued when due? . . . . . ☐ ☐
33. If interest of \$10 or more is paid to any individual or other entity, are 1099-INT forms issued? . . . . . ☐ ☐
34. If applicable, is Sales Tax paid promptly when due? . . . . . ☐ ☐
35. Are all persons handling money properly bonded? . . . . . ☐ ☐

**NOTE:** The Lodge Auditing Committee should report the results of this review at a regular meeting of the Lodge, adding any recommendations the Committee may have.

**REMARKS TO BE MADE ON SEPARATE PAGE IF NEEDED.**

**DO NOT** send copy to Grand Lodge Auditing and Accounting Committee or with the D.D. Visit Report. Auditor to the District Deputy Grand Exalted Ruler will examine this report.

# EXHIBIT K

## SELF-INSPECTION

COMPLETED BY: \_\_\_\_\_ TELEPHONE: (\_\_\_\_) \_\_\_\_\_ DATE: \_\_\_\_\_

Lodge Name & Number \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

NOTE TO DISTRICT DEPUTIES: Please access Self-Inspection checklist at: <http://www.elks.org/members/dds/selfinspection.cfm> for filing online.

<b>1</b>	<b>Access Roads, Walkways, Parking Areas</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Free of debris, cracks, broken pavement			
b.	Different elevations between adjacent walkways provided with guards or well marked			
c.	Walkways flat, well-drained, without holes			
d.	Fences & barricades secured & in good condition			
e.	Pathways & parking areas have adequate lighting			
f.	Walkways have safe clearance from motorized equipment			
g.	Signs indicating "Park at your own risk"			
<b>2</b>	<b>Stairs, Ramps &amp; Elevators/Lifts</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Standard stair rails or handrails provided on stairways with four or more stairs & ramps			
b.	Handrails well secured with no sharp or rough parts			
c.	Stair treads & risers free of chips, cracks, unevenness			
d.	Stair treads & ramps slip resistant			
e.	Stairways & ramps have adequate lighting			
f.	Stairs have at least 6½ feet overhead clearance			
g.	Elevators/lifts inspected as required by local law			
<b>3</b>	<b>Floor &amp; Wall Openings</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Large glass areas subject to human impact well marked			
b.	Floor opening provided with guard rail or cover			
c.	Grate type covers designed not to affect foot traffic			
d.	Safe, non-skid floors			
<b>4</b>	<b>Entrances/Exits</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Emergency lighting provided in corridors & stairways			
b.	All exits marked & properly illuminated			
c.	All doors, passages, stairs that aren't exits properly marked			
d.	All exits & passageways free of obstructions			
e.	At least two exits provided from upper floors			
<b>5</b>	<b>Exit doors</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	All exit doors open in the direction of exit			
b.	Cold storage room doors provided with inside release			
c.	Doors opening into street provided with warnings or barriers to prevent stepping into path of vehicles			
<b>6</b>	<b>Storage Areas</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Storage areas clean, dry & free of obstructions			
b.	Storage area locked while unattended			
c.	Flammables & combustibles stored away from heating devices & open flames			
d.	Trash & debris in metal covered containers & regularly removed			
<b>7</b>	<b>Emergency &amp; First Aid</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Emergency numbers posted at each phone			
b.	Employees instructed on reporting emergencies			
c.	Employees instructed on use of portable extinguishers			
d.	First Aid kits clean and fully stocked			
<b>8</b>	<b>Outdoor Fixtures &amp; Playgrounds</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Benches & tables free of cracks, splinters & broken parts			
b.	Water fountains & taps in good repair without broken parts			
c.	BBQ free of sharp edges or missing parts			
d.	Playground equipment clean & in good repair			
<b>9</b>	<b>Swimming Pool</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Appropriate caution signs posted			

b.	Properly enclosed to prevent falling into pool or access to children			
c.	Glass cups & plates not allowed in pool area			
d.	Remove diving board			
e.	Certified lifeguard on duty when pool is open			
<b>10</b>	<b>Kitchen, Bar &amp; Restaurant</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Metal container with cover provided for greasy rags			
b.	Knives stored in holders when not in use			
c.	Electrical cords & plugs of appliances in good condition			
d.	Food processing equipment properly guarded & in good repair			
e.	Glass stored away from open ice storage & food storage areas			
f.	Gas & beverage concentrate cylinders secured against tipping			
g.	Drain & other floor openings covered			
h.	Non-skid mats provided in line with sinks, ice machine, range, etc.			
i.	Mats clean and free of grease or other build-up			
j.	Food stored off the floor			
k.	Food covered & stored in refrigerator when not being prepared; proper temperature maintained			
l.	Hood & filters over range clean & not laden with grease			
m.	Suppression system in hood inspected in last 6 months			
n.	Chairs, stools & tables in good condition			
o.	Board of Health certified server and inspection			
<b>11</b>	<b>Restrooms, Locker Rooms, Showers &amp; Saunas</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Well-maintained, dry, clean, sanitized & free of debris			
b.	Adequate lighting; burned out bulbs promptly replaced			
c.	Hand towel, soap, toilet paper & sink fixtures secured and in good repair			
d.	Toilet stall & locker walls, doors & latches secure and in good repair			
e.	Walking surfaces made of non-skid materials			
f.	Appropriate warning signs posted: "CAUTION — SLIPPERY WHEN WET" or "DO NOT USE OVER 15 MINUTES," etc.			
<b>12</b>	<b>Personal Protection Devices</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	Appropriate protective devices provided for chemicals on site, including masks, safety aprons, gloves, goggles, etc.			
b.	Compliance with "Right to Know" requirements where applicable			
<b>13</b>	<b>Protection Devices</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
a.	All automatic fire sprinkler system supply valves wide open			
b.	All heat/smoke detection systems in operation			
c.	Portable extinguishers serviced in last 12 months & tagged			
d.	Pressures in appropriate range on gauge			
e.	Extinguishers properly mounted at stations			
f.	Extinguishers recharged, as required			
g.	All sleeping quarters provided with smoke detectors unless provided with automatic sprinklers and carbon monoxide detectors			

## HOW TO REVISE OR AMEND LODGE BY-LAWS AND HOUSE RULES

Every Lodge of the Order **MUST**, at least every five years, submit a general revision of its bylaws as well as the Lodge House Rules to its Area Member of the Grand Lodge Committee on Judiciary for approval pursuant to section 17.060 of the Statutes Annotated. This requirement applies regardless of the number of individual amendments approved since the Lodge's last general revision date or the fact that no changes are contemplated. House Rules must be submitted for approval at the same time as the Lodge Bylaws.

### 1. GENERAL REVISION

The Exalted Ruler should appoint a "Bylaws Revision Committee," which can revise the Lodge Bylaws and House Rules at <http://www.elks.org/grandlodge/bylaws>.

The committee should compare the present Lodge Bylaws and any amendments approved by Judiciary since the last general revision with the latest bylaw booklet provisions and the Annotated Statutes. This review is to determine what revisions, if any, and choices need to be made. The committee then compiles the proposed revised Bylaws and reports its recommendations in writing to the Lodge at a regular meeting. It is also advisable to publish any proposed changes in the Lodge newsletter, and to invite input from the Members to ensure that all have the opportunity to contribute their ideas. Changes to the House Rules are treated in a similar manner.

At that regular meeting, a motion to make consideration of the proposed general revision a "Special Order of Business" at a later regular meeting (*no fewer than two weeks or more than eight weeks*) should be made, seconded, and passed by a majority vote. At least ten days prior to the scheduled vote, the Lodge must notify all Members of the date of the meeting and the proposed revisions to be voted upon. Notification may occur in the Lodge newsletter if sent to Members at least ten days prior to voting.

At the meeting scheduled for the vote, the proposed revisions should be discussed and motions made to modify where necessary. The Lodge must approve the final version of each proposed change by a majority vote, taken by the voting sign of an Elk. Voting on a proposed revision cannot be postponed until a later meeting unless the ten-day notice is sent to all Members.

The committee then enters the approved provisions, fills in the designated fields, and chooses among the options offered. Delete all provisions that do not apply. The Secretary must certify the submission. Three signed and sealed copies of the booklet are mailed to your Area Member of the Committee on Judiciary for approval. The Lodge retains the fourth. Please include a cover letter with the Lodge's mailing and e-mail addresses, telephone number, and the name of the Lodge Secretary.

**NOTES:** The revised Bylaws do not take effect until approved by the Judiciary Member, who will notify the Lodge by e-mail. Direct all questions to the Judiciary Member for your Area.

The same procedure as outlined above is followed by a Lodge in the process of organization, except that the Bylaws Revision Committee has to prepare, notify, and submit the complete Bylaws for approval of the membership without consideration of previous bylaws. The Statutes require that the New Lodge's Bylaws be approved BEFORE a Charter can be issued.

### 2. BY-LAWS AMENDMENT

The procedure for amending one or more individual Bylaws is the same as that outlined above. The written amendment proposal should be typed out separately and presented to the Lodge at a regular meeting. The ten-day notice to all Members should first recite the pertinent Bylaw or section as it presently reads, and then state that it is to **"be amended to read as follows,"** followed by the proposed language. At the meeting scheduled for voting, the Lodge decides by a majority vote to approve or reject the proposal.

Substitute the phrase, "amendment to Article \_\_\_\_, Section \_\_\_\_ of the Bylaws of \_\_\_\_\_ Lodge No. \_\_\_\_" wherever the words "amended and substituted Bylaws" appear. Enter the dates of Lodge action on the certificates. The Exalted Ruler and the Secretary must sign and seal all three certificates. Then send the amendments and certificates to your Area Member of the Committee on Judiciary.

## EXHIBIT L-2

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Amendments are effective when your Lodge receives the Judiciary Member's approval. Changes in dues, however, become effective only on the following April 1.

Finally, to ensure that how you want to amend a Bylaw is permissible, review the appropriate section in the latest edition of the Statutes Annotated. You could also ask an attorney member of your Lodge for advice, or contact your Area Judiciary Member.

**NOTE:** If the general revision of your Lodge's Bylaws is past due, individual amendments cannot be approved. Your Lodge must submit a general revision to restore statutory compliance and permit your Judiciary Area Member to consider subsequent amendments for approval.

### 3. HOUSE RULES

Section 17.060 requires that a Lodge's House Rules be reviewed and revised at the same time as a general revision of the Bylaws. The procedures for Lodge approval of the House Rules are the same as those regarding a general revision or amendment. Include the revised House Rules to be approved via the online submission to your Area Member of the Committee on Judiciary.

### 4. PRINTING

Printed copies of a Lodge's full Bylaws (Code 520600) can be obtained from the Office of the Grand Secretary, 2750 N. Lakeview Avenue, Chicago, Illinois 60614-1889.

The Lodge's order must be placed as entered within one year of approval of either an original or general revision. The Area Member of the Committee on Judiciary files this booklet with the Grand Secretary, and only this copy is used for printing orders. Therefore, do not send your Lodge's file copy of the approved general revision.

A minimum order of 100 is required. Your Lodge should order a sufficient quantity to last approximately five years. Do not include payment with your Lodge's order. Printing takes two to three months, and the Grand Secretary's office cannot withhold or deposit funds that far in advance of delivery.

The basic prices in the supply catalog are subject to change without notice. Check the current Supply Catalog for the current price. The Lodge will be billed at the current price through normal procedures after shipment of the completed Bylaws.

Please indicate in the order whether the Lodge wishes to have its House Rules printed in the Bylaws booklet. If so, enclose a copy of the approved House Rules to be printed. There may be an additional charge for their inclusion, or for any large insertions or changes in the basic Bylaw text.

While a printing order is being processed, the Lodge may use its existing supply of previous Bylaws. To provide copies for New Members, just update the existing Bylaws by inserting the approved changes. If copies of the Lodge Bylaws are unavailable, the Lodge should order as many copies of the current Bylaws guide booklets with blank spaces (Code 520500) as it will need to comply with the Statutes, which requires that copies of the Bylaws be given to each New Member at Initiation. The guides are available from the Grand Secretary, and must be filled in by hand.

**NOTE:** Orders accompanied by unapproved booklets or additional bylaw texts will be returned. The Area Member of the Committee on Judiciary must approve all Bylaws, House Rules, and amendments before the Grand Secretary's office can print your order. Also, the Grand Secretary's office will not accept orders which require editing of Bylaws material or compiling to make the Bylaws complete. Nor will the Grand Secretary's office assume responsibility for errors. Please contact the Grand Secretary for further information before submitting your order.

## EXHIBIT M



Lodge Name &amp; Number

## TOTALS

**For Period Ending:**

## Comments

[illegible]



# EXHIBIT N

## 25-YEAR LODGE MEMBERSHIP RECAP (Based on March 31 report of years indicated)

State and District				Lodge Name and No.												
Year	Members as of 3/31	Initiated During Year	Affiliated		Total Added	Dropped Non-Payment	Expelled	Dimit Transfer	Dimit Absolute	Died	Total Dropped	Members as of 3/31	Net		Life Member	Honorary Life Member
			By Dimit	Reinstatement									Gains	Losses		
1997-1998																
1998-1999																
1999-2000																
2000-2001																
2001-2002																
2002-2003																
2003-2004																
2004-2005																
2005-2006																
2006-2007																
2007-2008																
2008-2009																
2009-2010																
2010-2011																
2011-2012																
2012-2013																
2013-2014																
2014-2015																
2015-2016																
2016-2017																
2017-2018																
2018-2019																
2019-2020																
2020-2021																
2021-2022																

# EXHIBIT O-1

## 20XX-20XX LODGE COMMITTEE CHAIRPERSONS

[Required per Sections 3.090 and 13.020]



**ER-ELECT & SECRETARY, PLEASE COMPLETE IMMEDIATELY!** Use this form as a WORKSHEET to file directly online at [elks.org/clms2web/confirmCommittees.cfm](https://elks.org/clms2web/confirmCommittees.cfm). Online filing must be completed on or before **APRIL 15**. Forms mailed to the Grand Secretary are no longer accepted. Any changes in Officer or Chairperson addresses may also be filed online.

PLEASE USE FULL NAMES. INCLUDE AREA CODE FOR ALL PHONE NUMBERS; AND IF P.O. BOX IS USED, BE SURE TO ADD A STREET ADDRESS FOR UPS DELIVERY. GIVE 9-DIGIT ZIP CODE. For assistance, logon to <https://tools.usps.com/go/ZipLookup>.

### Lodge Name (with state) and Number:

*Exalted Ruler	Member No.	**Trustee-Five Years	Member No.
*Leading Knight	Member No.	Tiler	Member No.
*Loyal Knight	Member No.	Esquire	Member No.
*Lecturing Knight	Member No.	Chaplain	Member No.
*Secretary	Member No.	Inner Guard	Member No.
*Treasurer	Member No.	Organist	Member No.
Trustee-One Year	Member No.	Presiding Justice	Member No.
Trustee-Two Years	Member No.	Soloist	Member No.
Trustee-Three Years	Member No.	Alternate Rep to GL	Member No.
**Trustee-Four Years	Member No.	<i>*Member of Standing Relief Committee per Sec. 13.010</i> <i>**Applicable if approved by Local Lodge By-Laws</i>	

### AUDITING AND ACCOUNTING COMMITTEE [As required per Sec. 13.040]

Chairperson \_\_\_\_\_ Member No. \_\_\_\_\_ H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # \_\_\_\_\_ O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

### PUBLIC RELATIONS COMMITTEE [As required per Sec. 13.024]

Chairperson \_\_\_\_\_ Member No. \_\_\_\_\_ H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # \_\_\_\_\_ O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

### ACTIVITIES COMMITTEE [As required per Sec. 13.021]

Chairperson \_\_\_\_\_ Member No. \_\_\_\_\_ H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # \_\_\_\_\_ O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

<1>

## EXHIBIT O-2

### Lodge Name (with state) and Number:

The following sub-committee chairpersons of the Activities Committee MAY be appointed & listed under [elks.org/clms2web](http://elks.org/clms2web)

#### Community Projects & Activities Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Youth Activities Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Hoop Shoot® Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Drug Awareness Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

### FRATERNAL COMMITTEE [As required per Sec. 13.022]

Chairperson \_\_\_\_\_ Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

The following sub-committee chairpersons of the Fraternal Committee MAY be appointed & listed under [elks.org/clms2web](http://elks.org/clms2web)

#### Americanism Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

## EXHIBIT O-3

### Lodge Name (with state) and Number:

#### Elks National

#### Foundation Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Flag Day

#### Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Elks Memorial

#### Day Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Membership (Membership, Lapsation, Orientation, Investigation) Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Lodge Activities

#### Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Veterans Service

#### Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

# EXHIBIT O-4

## Lodge Name (with state) and Number:

### OTHER STATUTORY LEADERSHIP REQUIREMENTS

#### Accident Prevention Chairperson

[As required per Sec. 12.070]

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### PER Association President

[As required per Sec. 13.190]

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

**The following sub-committee chairpersons MAY be appointed and listed under [elks.org/clms2web](http://elks.org/clms2web)**

#### Ritualistic Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Soccer Shoot® Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Government Relations Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### State Major Project Chairperson

Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_

#### Chairperson

Lodge Sub-committee Member No. H ( ) \_\_\_\_\_  
Address \_\_\_\_\_ Apt./Unit # O ( ) \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ C ( ) \_\_\_\_\_  
E-mail \_\_\_\_\_ F ( ) \_\_\_\_\_  
UPS Address: \_\_\_\_\_



# FRATERNAL NEWS GUIDELINES

## Material Appropriate for *The Elks Magazine*

**T**HE ELKS MAGAZINE is first and foremost interested in hearing about your lodge's charitable and civic activities. We would especially like to hear about your lodge's benevolent projects, specifically news about the following subjects:

- Youth Programs
- Veterans Service Activities
- State Major Projects
- Drug Awareness Programs
- Visits of the GER
- Elks National Foundation Activities
- Lodge Centennial Celebrations
- Institution of New Lodges
- Dedication of New Lodge Homes
- Mortgage-Burning Ceremonies
- Assistance to People in Distress
- Selected Army of Hope Activities
- Obituaries of Grand Lodge Officers

### Keep in Mind

- Submissions must be timely—mail your submission within two weeks of the date of your lodge's event.
- Information should be clear and complete. Answer the "five Ws" (who, what, where, when, and why). Make sure to mention who benefited from the lodge activities—children, veterans, students, etc.
- Include a contact person and a daytime phone number in case we need more information.

## Photo Considerations

*The Elks Magazine* welcomes photo submissions from lodges. Both 35mm prints and digital images are acceptable, but in order for any photo to be published, it must meet the following guidelines.

*Note:* The magazine tries to publish all photographs which meet these guidelines, but space constraints sometimes prevent this.

### Subject matter

- Photos should always include people; they should depict more than one person, but no more than ten. All individuals in photos must be identified from left to right (with full names and titles). Do not mark on the photographs themselves—use a separate sheet of paper.
- Photos must depict charitable events, veterans activities, antidrug program activities, etc., and must always include the individuals being served, e.g., charitable recipients, veterans, students/youths.
- Photos should not depict the presentation of bank checks, gift certificates, or savings bonds.
- Photos should never indicate the presence of alcohol or cigarettes.
- The backdrop or background of a photo is also important, and the photographer should "frame" each shot carefully.

### Reproduction quality

- Photos must be of good quality to be accepted. Make sure that the subjects are the focal point and that the photo is well composed; the lighting is adequate; and there is good contrast and sharp focus.
- People should be well positioned in the photos; candid shots/action shots are welcome as long as faces are in view and individuals can be identified. Relatively close-up shots are generally better than large group scenes.
- Newspaper photos, photocopies of photos, photos printed on computer printers, Polaroid photos, and negatives are not acceptable.
- Photos should never be bound with paper clips, stapled, or have writing on the back.
- Protect photos sent by US mail with cardboard or special packaging.

## EXHIBIT P-2

### Photo Considerations *(continued)*

#### Digital photographs

Digital images e-mailed to the magazine (magnews@elks.org) or mailed in on a diskette or CD can be used if they meet the same standards as those for 35mm prints, and some additional standards related specifically to the quality of digital images.

- A camera with at least three megabyte capacity should be used.
- Not all digital images are created equal. The key to good, reproducible digital photos is the file size of the image, with larger, higher resolution images being preferred. It is important to create, save, and send the image in high enough resolution. Digital photos must have a minimum resolution of 1,500 by 900 pixels, or dots, per image to be reproduced with acceptable quality; the higher the resolution, the better. Digital cameras generally can be set for high resolution using words like “high” versus “low” resolution, or by actually selecting or setting dimensions in pixels.
- Do not send in prints made from digital images—send in the image itself via e-mail or on a disk.

#### Keep in Mind

- It is a good idea to submit more than one photo (but no more than three of the same event), if possible, so that a range of selection is available.

#### Submit Appropriate Material To:

**The Elks Magazine**  
**Editorial Department** — OR — **magnews@elks.org**  
**425 W. Diversey Parkway**  
**Chicago, IL 60614-6196**

*Note:* Due to production schedules, expect news items to be published at least two months after submission.

- Remember that any photographs submitted may be used for marketing or other purposes. If permissions are required to reproduce photographs, it is the responsibility of the lodge to secure them.
- Fraternal news guidelines can also be found at [www.elks.org/elksmag/fraternalguidelines.cfm](http://www.elks.org/elksmag/fraternalguidelines.cfm).

### And You Can Do Much More . . .

**E**VERYTHING YOU SUBMIT to *The Elks Magazine* should also be suitable for your lodge bulletin, perhaps your state publication, and definitely your local media—newspapers, radio, and television. Your state sponsor, too, would like to know what your lodge is doing.

In addition, there are many activities at your lodge that, while not appropriate for *The Elks Magazine*, may deserve attention from your local media. After all, your members and your potential new members all live near your lodge, so let them know about the great work you’re doing and how they can become members or ask for assistance from the Order.

Here’s a list of news items that the magazine cannot include, but that can be submitted to your own community media to strengthen the presence of the Order:

- Awards to Elks (e.g., Elk of the Year and recognition given to lodges and state associations)
- Lodge Officer Installations
- Initiation Classes or Relative Initiations
- Old-Timer Recognition Programs
- Lodge Anniversaries other than Centennials
- Advertising for Profit or Fund-Raising Activities
- Social and Other Noncharitable Events
- Non-Elks Activities
- Blood Drives and Highway Cleanups
- Proclamations and Entries into Parades
- Youth Town-Takeovers
- Publicity for Future Events
- Poems, Eulogies, Editorials, and Humor
- Mandatory events, such as Flag Day observances and services held on Elks Memorial Sunday
- Elks “Hoop Shoot”

# EXHIBIT Q-1



## **Elks Drug Awareness Material Order Form**

### **Lodge Info**

Information about the lodge you are ordering literature for.

Lodge Name: \_\_\_\_\_

Lodge Number: \_\_\_\_\_

### **Shipping Address**

Please include a complete address, including a lodge or contact name. Shipments are by UPS, so be sure to give a street address, not a P.O. Box. Missing information will delay processing!

Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Address (2): \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip code: \_\_\_\_\_

☐ Residential Address ☐ Business Address

For Use (select one):

- ☐ Trailer
- ☐ School
- ☐ Special Event
- ☐ Law Enforcement
- ☐ Other

Ordering Materials for (select one):

- ☐ Lodge (max order 500)
- ☐ District Chair (max order 1000)
- ☐ State Chair (max order 2000)



## EXHIBIT Q-2



### Email Confirmation

Optional. A confirmation of this order will be emailed to you automatically. We'll send an *additional* confirmation to the address below.

Confirmation email: \_\_\_\_\_

### Select Literature

Please use full box count only.

Boxes Desired Amt. Per Pack		Code & Name
<input type="text"/>	250	DAP110: Underage Drinking - Myths and Facts
<input type="text"/>	250	DAP165: Coloring Book
<input type="text"/>	250	DAP170: How Can I Tell If My Child Is Using Drugs?
<input type="text"/>	250	DAP200: Tips for Teens - Tobacco
<input type="text"/>	250	DAP230: Bookmarks
<input type="text"/>	250	DAP265: Kids, Cars and Marijuana
<input type="text"/>	250	DAP270: Binge Drinking
<input type="text"/>	250	DAP275: Legalizing Marijuana
<input type="text"/>	50	DAP280: Elks National Drug Awareness Program
<input type="text"/>	1	DAP310: Parenting is Prevention Flashdrive
<input type="text"/>	1	DAP330: Video - UR Choice, UR Voice
<input type="text"/>	250	DAP350: Prescription Drugs
<input type="text"/>	250	DAP360: Marijuana Facts
<input type="text"/>	250	DAP370: Heroin
<input type="text"/>	250	DAP380: Impaired Driving
<input type="text"/>	250	DAP385: Ecstasy & Molly
<input type="text"/>	250	DAP390: K2/Spice
<input type="text"/>	250	DAP395: DXM

Online form at: [www.elks.org/resources/dap/downloads.cfm](http://www.elks.org/resources/dap/downloads.cfm)

## EXHIBIT Q-3

Boxes Desired Amt. Per Pack		Code & Name
<input type="text"/>	250	<b>DAP400:</b> Methamphetamine
<input type="text"/>	50	<b>DAP405:</b> Elks Drug Quiz
<input type="text"/>	250	<b>DAP410:</b> Heroin-Fentanyl
<input type="text"/>	250	<b>DAP420:</b> Vaping
<input type="text"/>	250	<b>DAP430:</b> Red Ribbon History
<input type="text"/>	250	<b>DAP435:</b> Bullying & Drug Abuse: The Connection
<input type="text"/>	250	<b>DAP440:</b> Stress & Drug Abuse

Please describe special instructions or exceptions here.

### **HONORS TO PAST GRAND EXALTED RULERS, GRAND LODGE OFFICERS OR DISTRICT DEPUTY GRAND EXALTED RULERS**

When a Past Grand Exalted Ruler, a Grand Lodge Officer or a District Deputy Grand Exalted Ruler officially visits a Local Lodge, he/she shall be received in the following manner.

***Exalted Ruler:*** Lodge Esquire, you will retire to the anteroom and cause our honored guest to approach the Altar and introduce him/her to the Lodge.

[The Esquire retires.]

***Exalted Ruler:*** (★ ★ ★) Raps

[The Esquire escorts the honored guest into the Lodge room about two paces in front center of the Altar. The Esquire shall continue by introducing the honored guest by giving his/her name and the name and number of his/her Lodge. The honored guest, when the number of his/her Lodge is announced, shall take one step forward and give the hailing sign.]

***Exalted Ruler:*** *[Answers with a wave of the hand.]*

***Exalted Ruler:*** Please extend the Grand Lodge Honors to \_\_\_\_\_.

[The honored guest shall be saluted with the hailing sign given once only by all the Members in unison, including the Exalted Ruler, led by the Esquire.]

***Honored Guest:*** *[Answers with a wave of the hand. Then the honored guest shall step back one pace.]*

***Exalted Ruler:*** Lodge Esquire, you will now conduct our honored guest to a seat at my right.

***Exalted Ruler:*** ( ★ ) Rap

[The Esquire shall return to his/her station and be seated.]

## EXHIBIT S

# 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\_\_\_\_

### MEMBERSHIP TRANSACTIONS

*(Based on yearly Worksheet)*

Number of Elks on April 1 \_\_\_\_\_  
Number Initiated \_\_\_\_\_  
Number Affiliated by Dimit \_\_\_\_\_  
Number Reinstated \_\_\_\_\_  
Lines 2,3,& 4—Total Added \_\_\_\_\_  
Number stricken for nonpayment \_\_\_\_\_  
Number Expelled \_\_\_\_\_  
Transfers Granted \_\_\_\_\_  
Absolute Dimits Granted \_\_\_\_\_  
Number Deceased \_\_\_\_\_  
Lines 6-10 = Total Dropped \_\_\_\_\_  
Total on Sept. 30 \_\_\_\_\_  
Lines 1 & 5 minus Line 11 \_\_\_\_\_

### DELINQUENTS

6 months in arrears \_\_\_\_\_  
1 year in arrears \_\_\_\_\_  
Over 1 year in arrears \_\_\_\_\_

### 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\_\_\_\_

### MEMBERSHIP TRANSACTIONS

*(Based on yearly Worksheet)*

Number of Elks on October 1 \_\_\_\_\_  
Number Initiated \_\_\_\_\_  
Number Affiliated by Dimit \_\_\_\_\_  
Number Reinstated \_\_\_\_\_  
Lines 2,3,& 4—Total Added \_\_\_\_\_  
Number stricken for nonpayment \_\_\_\_\_  
Number Expelled \_\_\_\_\_  
Transfers Granted \_\_\_\_\_  
Absolute Dimits Granted \_\_\_\_\_  
Number Deceased \_\_\_\_\_  
Lines 6-10 = Total Dropped \_\_\_\_\_  
Total on March 31 \_\_\_\_\_  
Lines 1 & 5 minus Line 11 \_\_\_\_\_

### DELINQUENTS

6 months in arrears \_\_\_\_\_  
1 year in arrears \_\_\_\_\_  
Over 1 year in arrears \_\_\_\_\_

### DUES

Collected \_\_\_\_\_  
To be collected \_\_\_\_\_

### PER CAPITA FEES

GL

SL

### DISTRICT

Collected \_\_\_\_\_  
To be collected \_\_\_\_\_  
Are By-Laws current? Yes ☐ No ☐  
Expiration Date \_\_\_\_\_

# EXHIBIT T-1

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Lodge Name \_\_\_\_\_ State \_\_\_\_\_ Lodge # \_\_\_\_\_

## CONFLICT OF INTEREST AGREEMENT

All applications of this document are subject to the laws of the state in which the employee works. This document should be reviewed by local independent legal counsel prior to Lodge use of it.

All employees will be required to complete an Agreement concerning ethical standards of conduct & conflict of interest and confidentiality.

### Conflict of Interest:

---

In order to safeguard the activities and assets of the **[Lodge Name & #]**, employees of **[Lodge Name & #]** should not have interests in outside businesses which conflict or appear to conflict with their ability to act and make independent decisions in the best interest of **[Lodge Name & #]**.

An employee is considered to have an interest in an outside business if the employee, or any member of his/her immediate family, holds any ownership in the business or its property; furnishes goods or services to the business; is a creditor, employee, agent, officer, director, or consultant of the business. Outside businesses include any person, firm, corporation, or government agency that sells or provides a service to, purchases from, or competes with **[Lodge Name & #]**. (Excluded are investments in the securities of a bank, public utilities, and transportation companies subject to regulations by government authority or a mutual fund or investment company registered under the Investment Company Act. Also are securities listed on a national securities exchange or customarily bought and sold at least once a week in the over-the-counter market or in which the employee and/or his or her family have less than \$20,000 invested, at cost or market value, or hold less than one percent of such outstanding securities.)

All employees are expected to exercise good judgment and discretion in evaluating a particular activity so as to avoid any actual, or apparent, conflict of interest. If there is a doubt, the employee should discuss it with his/her supervisor and/or **[Name, Exalted Ruler of Lodge Name & #]**.

\_\_\_\_\_  
DATE

\_\_\_\_\_  
EMPLOYEE NAME (Printed)

\_\_\_\_\_  
EMPLOYEE SIGNATURE



Benevolent & Protective Order of Elks of the USA

## EXHIBIT T-2

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Lodge Name \_\_\_\_\_ State \_\_\_\_\_ Lodge # \_\_\_\_\_

### ETHICAL STANDARDS AGREEMENT

All applications of this document are subject to the laws of the state in which the employee works. This document should be reviewed by local independent legal counsel prior to Lodge use of it.

All employees will be required to complete an Agreement concerning ethical standards of conduct & conflict of interest and confidentiality.

#### Ethical Standards:

---

**[Lodge Name & #]** expects its employees to observe the highest standards of business ethics. No employee should take any action on behalf of the Company that they know, or reasonably should know, violates any applicable law or regulation. This obviously includes such activities as bribery, kickbacks, falsehoods, and misrepresentation.

**[Lodge Name & #]** prohibits all employees from accepting gifts, gratuities, or entertainment from individuals and firms with whom **[Lodge Name & #]** does business. It is also a violation to give gifts to individuals or firms with whom **[Lodge Name & #]** does business. Excluded from this prohibition is the exchange of normal business courtesies such as luncheons or dinners, when they are proper and consistent with regular business practice. Also excluded are advertising or promotional materials and holiday or other gifts, which are of nominal value (less than \$50.00).

\_\_\_\_\_  
DATE

\_\_\_\_\_  
EMPLOYEE NAME (Printed)

\_\_\_\_\_  
EMPLOYEE SIGNATURE



Benevolent & Protective Order of Elks of the USA

## EXHIBIT T-3

Lodge Name \_\_\_\_\_ State \_\_\_\_\_ Lodge # \_\_\_\_\_

### CONFIDENTIALITY AGREEMENT

All applications of this document are subject to the laws of the state in which the employee works. This document should be reviewed by local independent legal counsel prior to Lodge use of it.

All employees will be required to complete an Agreement concerning ethical standards of conduct & conflict of interest and confidentiality.

#### Confidentiality:

**[Lodge Name & #]** expects its employees to maintain the confidential aspects of his/her employment, including but not limited to the following:

- ☐ The copying or duplication (by any means) of any records or lists or a portion of such lists of members, donors or any other groups within the Order for the personal use or for the use of any other party or groups for any purpose not appropriately approved by the Lodge Board of Directors/Trustees is strictly prohibited.
- ☐ The disclosure or duplication of information, in any form, deemed sensitive or confidential by the Elks management or the Lodge Board of Directors/Trustees is prohibited.
- ☐ The duplication, dissemination or attempted reverse engineering (or assisting in such actions) of any hardware or software related to Elks data processing operations and record keeping is prohibited.
- ☐ The disruption, misuse or diminishment of any of the Elks copyrights/trademarks in any fashion is prohibited.

Failure to comply with the aforementioned provisions may result in corrective action, up to and including termination of employment.

- A. Do you or any member of your immediate family hold any "interest" in an "outside business" in such terms as defined above (check only one)? YES NO If YES, please explain on the reverse side of this form.
- B. Do you have any other relationships that might reasonably be regarded as creating a possible conflict of interest (check only one)?
- ☐ YES ☐ NO If YES, please explain on the reverse side of this form.

I certify that I have read, understand and will comply with the **[Lodge Name & #]**'s position on Confidentiality. I also understand my obligations to immediately disclose any potential conflict of interests.

\_\_\_\_\_  
DATE

\_\_\_\_\_  
EMPLOYEE NAME (Printed)

\_\_\_\_\_  
EMPLOYEE SIGNATURE



Benevolent & Protective Order of Elks of the USA

## EXHIBIT U

### ***CERTIFICATE OF SUSPENSION OF A LODGE OFFICER OR MEMBER INVOLVED IN A LOCAL FORUM PURSUANT TO SECTION 8.180 OF THE 2015 STATUTES ANNOTATED***

**NOTE:** You shall not file a certificate without first receiving approval of your State Sponsor or other supervisory official (Special Deputy Grand Exalted Ruler or District Leader.)

**LOCAL FORUM OF** \_\_\_\_\_, **LODGE NO.** \_\_\_\_\_  
(Lodge Name) (State)

\_\_\_\_\_  
Accuser

v.

\_\_\_\_\_  
Accused

I have reviewed the within Local Forum Complaint, and in my opinion there is reasonable cause for the Complaint.

Accordingly, I suspend the Accused from duty, and direct the Lodge to notify the Accused of this suspension.

If the suspended Officer is the Exalted Ruler, his or her duties shall devolve upon the other chair Officers of the Lodge in order of their rank. If any other Officer is suspended herein, the Exalted Ruler shall appoint a Member of the Lodge to perform the duties of the suspended Officer. I further direct the Lodge to notify the suspended Officer that if he or she has books, records or property of the Lodge in his or her custody, such shall be surrendered to the appointed Member.

Certified and filed on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ with the Secretary of

\_\_\_\_\_, \_\_\_\_\_ Lodge No. \_\_\_\_\_.  
(Lodge Name) (State)

\_\_\_\_\_  
District Deputy Grand Exalted Ruler

\_\_\_\_\_, \_\_\_\_\_ District No. \_\_\_\_\_.  
(State) (District Name)

**(Instructions and distribution:** the original of this document is to be filed with the secretary of the Lodge where the accused is a member. Copies of this document shall also be mailed or personally delivered to the accused, the accuser and the state sponsor. The Lodge Secretary shall read this certificate on the floor of the Lodge at the next regular Lodge meeting after receipt of the same.)



# EXHIBIT V

## PROPER FORMS OF ADDRESS

Always consult your current *Grand Lodge & State Associations Directory* for the correct name and address 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, reference to “Honorable” or “Hon.” was discontinued in 2011 based upon a directive from the Future of Elksdom Committee, so is no longer required for addressing Grand Lodge Officers, Grand Lodge Committee Chairpersons and Committee Members.

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

Name	Office of the G. E. R.
Grand Exalted Ruler	Name
B. P. O. Elks	B. P. O. Elks
(then 2-line address)	(then 2-line address)

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

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

Name  
Past Grand Exalted Ruler  
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 Foundation  
B.P.O. Elks  
(then 2-line address)

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

Name, D. D. G. E. R.  
(State) Southwest District No. 000  
B. P. O. Elks  
(then 2-line address)

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

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

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

# EXHIBIT W

## ATTENDANCE REPORT GRAND LODGE SESSIONS

STATE \_\_\_\_\_ DISTRICT \_\_\_\_\_ YEAR \_\_\_\_\_

Lodge Name & Number	Title of Representative	Monday	Tuesday	Wednesday

**P = Present**

**A = Absent**

**E = Excused**

1. It is required that you complete this report for the Grand Lodge Session. If your Sponsor has supplied his own reporting form, disregard this sample.
2. List the Lodges in your District and enter the names of the Lodge representatives (Exalted Ruler or PER Alternate Representative).
3. For each day, enter present (P), or absent (A) or excused (E). (If Lodge representative has a valid excuse, please make notation and attach explanation.)
4. If no representative is to be present at the Grand Lodge Session, indicate "No Rep" and attach explanation.
5. E-Mail, fax or mail a copy only to your Sponsor(s).
6. E-mail a copy to the Grand Secretary at [DDGERfile@Elks.Org](mailto:DDGERfile@Elks.Org)

# EXHIBIT X

## Lodge Financial Evaluation Report



**GRAND LODGE**  
*Benevolent and Protective*  
**ORDER OF ELKS**  
UNITED STATES OF AMERICA

### Auditing and Accounting Committee

**Anytown, Lodge No. XXXX**

**Report Year: 2020**

**State:**

**District:**

**Area:**

**ACKNOWLEDGEMENT OF RECEIPT OF FINANCIAL REPORT AND EVALUATION THEREOF:  
TO BE READ ON THE LODGE FLOOR AND RETAINED AS A PERMANENT RECORD OF THE LODGE**

*Please insure that the Trustees/Board of Directors & Your Independent Accountant receive a copy of this report.*

Report for Year Ended March 31st Membership Total	2018 281	2019 264	2020 262
1. Date of Review by Grand Lodge Committee Member	08/26/2018	06/28/2019	10/19/2020
2. Were all entities of the Lodge reported?	Yes	Yes	—
3. Amount of Working Capital	(\$31,360.00)	(\$54,253.00)	(\$98,731.00)
4. Amount of Total Equity	\$824,217.00	\$821,647.00	\$836,803.00
5. Lodge Net Profit	(\$20,001.69)	(\$1,275.00)	(\$26,803.00)
6. Club and Other Operations Net Profit	\$11,644.39	(\$1,295.00)	—
7. Bar Net Profit	—	—	\$27,919.00
8. Bar, Cost of Sales (pct)	35.70%	27.80%	27.63%
9. Bar, Cost of Labor (pct)	12.90%	0.00%	0.07%
10. Food Service Net Profit	—	—	\$10,259.00
11. Food Service, Cost of Sales (pct)	43.50%	54.10%	51.82%
12. Food Service, Labor (pct)	3.80%	0.00%	0.02%
13. Other Operations Net Profit (bowling alley, golf course, etc.)	—	—	\$0.00
14. Other Operations Net Profit - 16.030 For Profit Corporation	—	—	\$0.00
15. Other Operations Net Profit (501c3 Corporation)	—	—	\$0.00
16. Date of last IRS form 990 filing	—	—	08/27/2020
17. Did the Lodge file a Form 990-T?	Yes	No	Yes
18. Date lodge filed IRS form 990-T	—	—	08/27/2020
Submitted by Committee Member	William Chinn, Jr.	William Chinn, Jr.	William Chinn, Jr.
Report Prepared	9/19/2018 Finalized	7/26/2019 Finalized	10/19/2020 Finalized

#### 2020 Comments:

Key to comments:

Normal text — New comment this year

Italics Text — Repeat of comment from last year

**Bold Text** — Multiple year repeat of comment without correction or response from Lodge

**Bold Italics Text** — Critical Issue that requires immediate action by the Lodge

1. **Page 2** — The Lodge's Working Capital remains negative at \$(98,731) and worsened compared to the prior year. It should be \$82,422.
2. **Page 8, Line 15** — Food Service Cost of Sales is 16.82% over the recommended 35%. Club management needs to address this issue. Are the proper procedures in place to charge the Lodge accounts for complimentary and/or reduced cost meals and beverages for events such as dignitary visitations?

**PLEASE REVIEW WITH YOUR ACCOUNTANT OR TAX RETURN PREPARER ALL ITEMS REGARDING FORM 990 (or 990-EZ) and FORM 990-T.**

No comments.

Note: With the exception of Question 17, any questions answered "No" indicate a deficiency in the report as it has been submitted. You should consult the Auditing & Accounting Manual and Section 13.040 of the Laws of the Order and make necessary corrections.



**DDGER  
REIMBURSEMENT  
VOUCHER**

PAY TO: \_\_\_\_\_  
NAME

\_\_\_\_\_  
STREET OR P.O. BOX

\_\_\_\_\_  
CITY, STATE, ZIP + 4

Lodge Visitations:

Date	Lodge # Home Lodge DD Visit	City	Mileage N/C	BATCH
____/____/____	_____	_____	_____	_____
____/____/____	_____	_____	_____	_____
____/____/____	_____	_____	_____	VOUCHER # _____
____/____/____	_____	_____	_____	_____
____/____/____	_____	_____	_____	_____
____/____/____	_____	_____	_____	_____
____/____/____	_____	_____	_____	_____
____/____/____	_____	_____	_____	_____
____/____/____	_____	_____	_____	_____
____/____/____	_____	_____	_____	_____
____/____/____	_____	_____	_____	_____

1. AFTER **FINAL** LODGE VISIT, SUBMIT VOUCHER.
  2. SUBMIT FINAL VOUCHER ON OR BEFORE **MAY 1st**.
  3. SUBMIT VOUCHER AND **RECEIPTS** TO THE **GRAND SECRETARY**.
  4. SUBMIT **ONLY A COPY** OF THE VOUCHER TO YOUR **SPONSOR(S)**.

Authorized Visits: \_\_\_\_\_  
Total \_\_\_\_\_ Miles @ \$ .30 \$ \_\_\_\_\_

OTHER EXPENSE:

Photocopies (attach receipts)..... \$ \_\_\_\_\_  
Postage (attach postal receipts)..... \$ \_\_\_\_\_  
Telephone (make photocopies of phone bills) ..... \$ \_\_\_\_\_  
\* Other (explain) Motel (only if NOT paid by visiting Lodge - attach receipts) ..... \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

Grand Total \$ \_\_\_\_\_

Approved for Payment:	Gen. Ledger Distribution:		DATE  I hereby certify that the above claim is correct and legally chargeable to the Elks, U.S.A.  SIGNATURE  DIST NAME _____ DIST NO. _____  <b>* ATTACH RECEIPTS</b>
	A/C#	Amount	
	_____	_____	
	_____	_____	
	_____	_____	
Comptroller	_____	_____	
Grand Secretary	_____	_____	
Approving Member, Board of Grand Trustees	_____	_____	
State Sponsor/PGER	Mo. Recorded _____	_____/_____ (Month) (Year)	



**DDGER  
REIMBURSEMENT  
VOUCHER**

**PAY TO:** \_\_\_\_\_  
NAME

\_\_\_\_\_  
STREET OR P.O. BOX

\_\_\_\_\_  
CITY, STATE, ZIP + 4

**Lodge Visitations:**

Date	Lodge # Home Lodge DD Visit	City	Mileage N/C
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____

**BATCH** \_\_\_\_\_

**VOUCHER #** \_\_\_\_\_

**REF #** \_\_\_\_\_

**Authorized Visits:** \_\_\_\_\_

**Total** \_\_\_\_\_ **Miles @ \$ .30** \$ \_\_\_\_\_

**OTHER EXPENSE:**

Photocopies (attach receipts) ..... \$ \_\_\_\_\_

Postage (attach postal receipts) ..... \$ \_\_\_\_\_

Telephone (make photocopies of phone bills) ..... \$ \_\_\_\_\_

\* Other (explain) Motel (only if NOT paid by visiting Lodge - attach receipts) ..... \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**Grand Total** \$ \_\_\_\_\_

**Approved for Payment:**

\_\_\_\_\_  
Comptroller

\_\_\_\_\_  
Grand Secretary

\_\_\_\_\_  
Approving Member, Board of Grand Trustees

\_\_\_\_\_  
State Sponsor/PGER

**Gen. Ledger Distribution:**

A/C#	Amount
------	--------

**Mo. Recorded**

\_\_\_\_/\_\_\_\_  
(Month) (Year)

DATE

I hereby certify that the above claim is correct  
and legally chargeable to the Elks, U.S.A.

SIGNATURE

DIST NAME

DIST NO.

**\* ATTACH RECEIPTS**





**DDGER  
REIMBURSEMENT  
VOUCHER**

**PAY TO:** \_\_\_\_\_  
NAME

\_\_\_\_\_  
STREET OR P.O. BOX

\_\_\_\_\_  
CITY, STATE, ZIP + 4

**Lodge Visitations:**

Date	Lodge # Home Lodge DD Visit	City	Mileage N/C
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____

**BATCH** \_\_\_\_\_

**VOUCHER #** \_\_\_\_\_

**REF #** \_\_\_\_\_

**Authorized Visits:** \_\_\_\_\_

**Total** \_\_\_\_\_ **Miles @ \$ .30** \$ \_\_\_\_\_

**OTHER EXPENSE:**

Photocopies (attach receipts) ..... \$ \_\_\_\_\_

Postage (attach postal receipts) ..... \$ \_\_\_\_\_

Telephone (make photocopies of phone bills) ..... \$ \_\_\_\_\_

\* Other (explain) Motel (only if NOT paid by visiting Lodge - attach receipts) ..... \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**Grand Total** \$ \_\_\_\_\_

**Approved for Payment:**

\_\_\_\_\_  
Comptroller

\_\_\_\_\_  
Grand Secretary

\_\_\_\_\_  
Approving Member, Board of Grand Trustees

\_\_\_\_\_  
State Sponsor/PGER

**Gen. Ledger Distribution:**

A/C#	Amount
------	--------

**Mo. Recorded**

\_\_\_\_/\_\_\_\_  
(Month) (Year)

DATE

I hereby certify that the above claim is correct  
and legally chargeable to the Elks, U.S.A.

SIGNATURE

DIST NAME

DIST NO.

**\* ATTACH RECEIPTS**







**DDGER  
REIMBURSEMENT  
VOUCHER**

**PAY TO:** \_\_\_\_\_  
NAME

\_\_\_\_\_  
STREET OR P.O. BOX

\_\_\_\_\_  
CITY, STATE, ZIP + 4

**Lodge Visitations:**

Date	Lodge # Home Lodge DD Visit	City	Mileage N/C
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____
____/____/____	_____	_____	_____

**BATCH** \_\_\_\_\_

**VOUCHER #** \_\_\_\_\_

**REF #** \_\_\_\_\_

**Authorized Visits:** \_\_\_\_\_

**Total** \_\_\_\_\_ **Miles @ \$ .30** \$ \_\_\_\_\_

**OTHER EXPENSE:**

Photocopies (attach receipts) ..... \$ \_\_\_\_\_

Postage (attach postal receipts) ..... \$ \_\_\_\_\_

Telephone (make photocopies of phone bills) ..... \$ \_\_\_\_\_

\* Other (explain) Motel (only if NOT paid by visiting Lodge - attach receipts) ..... \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

**Grand Total** \$ \_\_\_\_\_

**Approved for Payment:**

\_\_\_\_\_  
Comptroller

\_\_\_\_\_  
Grand Secretary

\_\_\_\_\_  
Approving Member, Board of Grand Trustees

\_\_\_\_\_  
State Sponsor/PGER

**Gen. Ledger Distribution:**

**A/C#**      **Amount**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Mo. Recorded** \_\_\_\_\_ / \_\_\_\_\_  
(Month)      (Year)

DATE

I hereby certify that the above claim is correct  
and legally chargeable to the Elks, U.S.A.

SIGNATURE

DIST NAME

DIST NO.

**\* ATTACH RECEIPTS**



## District Deputy Grand Exalted Ruler

*Elks Care — Elks Share*



Both printed & online PDF versions updated February 2021.